CLARIS™

ClarisWorks™

Getting Started

CLARIS

Claris Customer Support

Claris Customer Support

Thank you for purchasing a Claris™ software product. Please take a minute to find out about the support and services available to you as a Claris customer. Claris Customer Support is dedicated to ensuring that our customers receive the utmost value from their purchase. Please note that benefits and service offered by CLARIS are subject to change without notice.

Complete and Mail Your Registration Card!

In order to provide you with service, we need to know who you are. Please take the time now to complete and mail the product registration card. It is included in the envelope containing your program disk(s). Just select the appropriate card for your country, fill it out, and send it in. We would also appreciate your answers to the questions about where you bought your Claris product and how you plan to use it. Thank you in advance for your prompt response.

For your records, please take a moment to write down your product registration number, the date you sent in your card, and the address to which you sent it, in the space provided below. Also, don't forget to save the upper portion of your registration card.

Important: Please enter the date and the address where you mailed your original international Registration Card:

Claris office/Claris distributor

Address

City State/Province Postal code

Country Telephone (include Area Code)

Date Mailed

Technical Publications

Included with your software are several written documents. Getting Started booklets are designed to help you start up your new programme quickly and painlessly. The user's manuals contain more detailed information to help you use the programme to its fullest capacity. All written documentation includes a table of contents and an index to provide easy access to the information you seek. In addition, the quick reference guides are a convenient source of information on how the programme can be used. To supplement printed documentation, most Claris products contain online information. This information varies according to the product, and might include help systems, guided tours, and tutorials. Online Help systems are available to answer your questions while you are using your programme. Guided tour and tutorial disks are separate from the programme. They are designed to introduce you to the basics. The written documentation will give you more detailed information or instruction.

Defective or Damaged Products

If your product is defective or damaged, please contact the claris distributor in your country. The distributor will make arrangements to replace the defective part. Defective disks and manuals will be replaced free of charge during the 90-day limited warranty period. The distributor can also inform you of the policy for replacement after the warranty period. For the distributor that services your country, please refer to the distributor sheet included in your software package.

Product Upgrades and Updates

Contact the dealer from which you purchased your software for information on the latest versions of products, features, availability, and pricing.

We also welcome you to contact Claris Customer Relations in the U.S. Our English-speaking team of service specialists are available Monday through Thursday, from 8:00 AM to 5:00 PM; Fridays, 8:00 AM to 2:00 PM Pacific Standard Time. You can also write, FAX, or AppleLink us, and we will reply promptly!

Customer Relations
Claris Corporation
5201 Patrick Henry Drive
M/S C-71
Box 58168
Santa Clara, CA 95052-8168

Tel: 408/727-8227
FAX: 408/987-7447
AppleLink: Claris.CR

Canadian Customer Support Services 408/727-8227

Please take a moment to read the following information about the services and support available to you as a registered owner of a Claris software product.

Registration Status

Customer Relations can answer questions regarding your registration status. Please have your registration number handy when you call.

Change of Address
Customer Relations also handles change of address requests. Please send a letter indicating both your old and new addresses to:

Customer Relations
Claris Corporation
5201 Patrick Henry Drive
M/S C-71
Box 58168
Santa Clara, CA 95052-8168

ATTN: CHANGE OF ADDRESS

Product Upgrades and Updates

Upgrades are major revisions and enhancements to existing products which are available at special prices to registered customers. For information on upgrades, please contact Canadian Upgrade Centre Monday through Friday, between 8:00 AM and 5:30 PM Eastern Standard Time at 800/668-8948, or write to:

Claris Software Upgrades
Bowdens Information Services
624 King Street West
Toronto, ON M5V 2X9

Update are minor revisions and improvements made to products which are available free to registered customers. For information on updates, please contact Customer Relations Monday through Friday, between 8:00 AM and 5:00 PM and Fridays 8:00 AM to 2:00 PM, at 408/727-8227, or write to:

Customer Relations
Claris Corporation
5201 Patrick Henry Drive
M/S C-71
Box 58168
Santa Clara, CA 95052-8168

Damaged or Defective Products

Contact Customer Relations if your product is damaged or defective. Be sure to have your product serial number handy when you call. Defective disks will be replaced free of charge during the 90-day limited warranty period. After the warranty period, replacement disks cost $12 (Canadian dollars accepted) and are available only to registered customers. Send the defective disk, a brief explanation, and payment (if necessary) to:

Customer Relations
Claris Corporation
5201 Patrick Henry Drive
M/S C-70
Box 58168
Santa Clara, CA 95052-8168

Local Claris Dealers

You may contact Customer Relations for the name of a Claris dealer near you.

Training

Claris is working with training professionals in Canada to make high-quality training programmes available for all Claris customers. Claris Authorized Training Centres can provide advanced courses that can be customized to meet the needs of individuals and organizations. For the location of the nearest training centre, contact Customer Relations.

Technical Solutions Newsletter

As a registered customer, you will receive regular issues of Technical Solutions, the Claris Newsletter. In it you'll find the latest product news, helpful hints, telephone numbers, and other useful information regarding Claris products.

Claris Customer Support Services 408/727-8227

As a registered owner of Claris software, you are entitled to technical support for your product. Please contact the dealer from which you bought your Claris software for technical assistance. Before you call please take a moment to check the following items. Many problems can be solved without our help.

Please fill out the information below and have it available when you call Claris Technical Support. This will enable the Support Specialist to answer your question more quickly.

Software_____ Version_____ Serial Number _____

Computer Typ_____ Model _____

RAM (memory _____ Hard Disk _____

Operating System _____

System Version _____ Finder Version _____

Printer_____ Plotter _____

Expansion Board #1 _____ Slot # _____

Expansion Board #2 _____ Slot # _____

Expansion Board #3 _____ Slot # _____

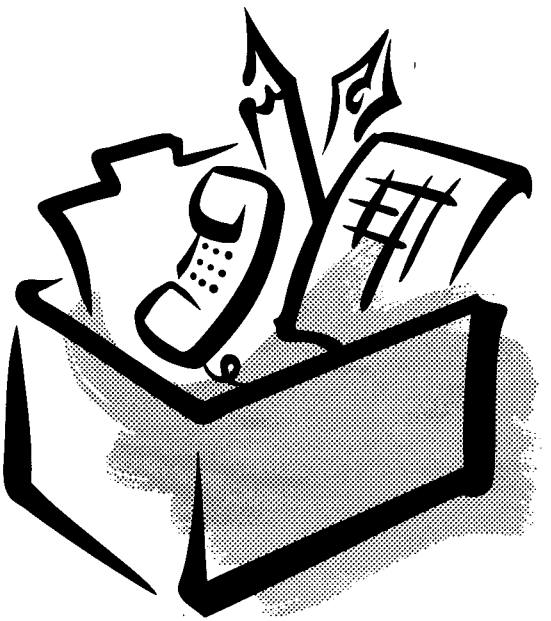
Expansion Board #4 _____ Slot # _____

Modem Type _____

Network Type _____ Network Software Version _____

We also welcome you to contact Claris Technical Support in the U.S. Our English-speaking team of service specialists are available Monday through Thursday, from 6:00 AM to 6:00 PM; Fridays, 6:00 AM to 2:00 PM Pacific Standard Time. You can also write, FAX, or AppleLink us, and we will reply promptly!

Claris Corporation
Technical Support
M/S C-12
5201 Patrick Henry Drive
Box 58168
Santa Clara, CA 95052-8168
Tel: 408/727-8227
FAX: 408/987-7447
AppleLink: Claris.Tech



ClarisWorks

Getting Started

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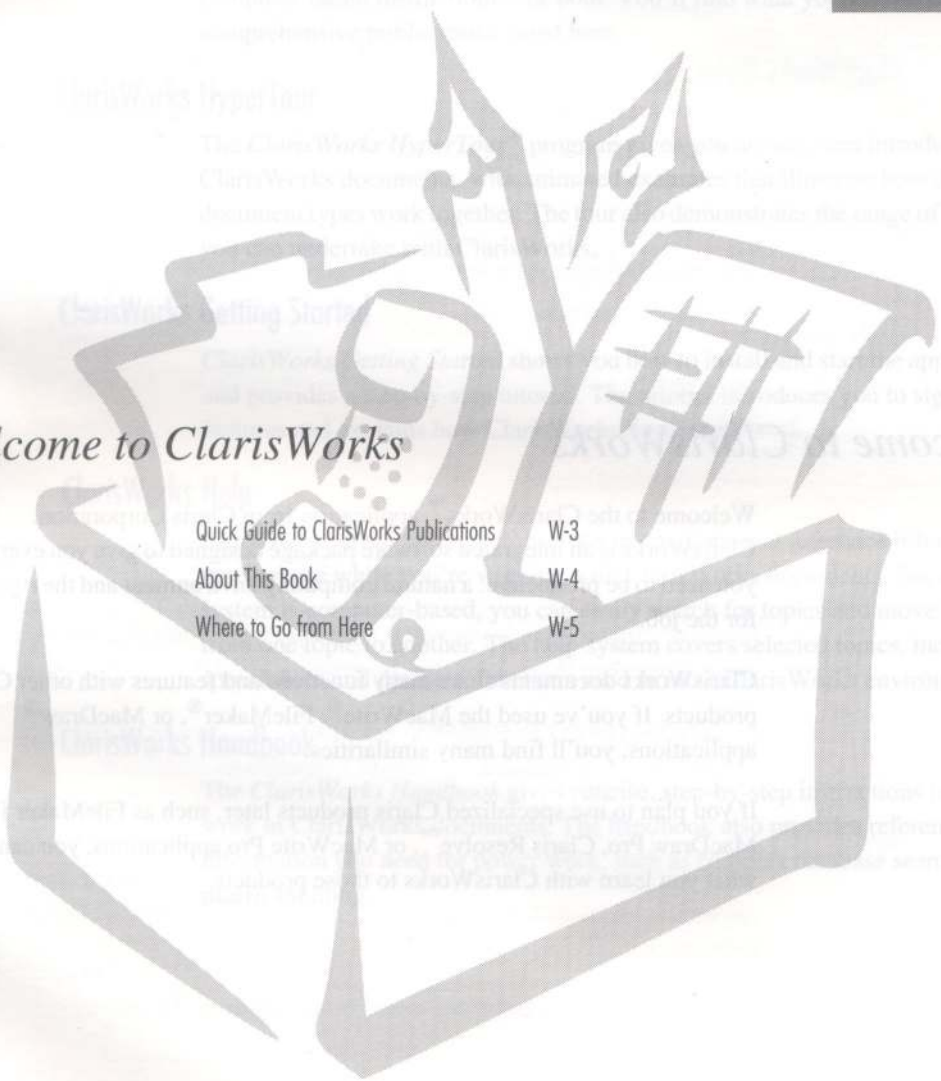

Welcome to ClarisWorks

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Welcome to ClarisWorks

Welcome to the ClarisWorks™ application from Claris Corporation. ClarisWorks is an integrated software package designed to give you everything you need to be productive: a natural computing environment and the right tools for the job.

ClarisWorks documents share many functions and features with other Claris® products. If you've used the MacWrite®, FileMaker®, or MacDraw® applications, you'll find many similarities.

If you plan to use specialized Claris products later, such as FileMaker Pro, MacDraw Pro, Claris Resolve™, or MacWrite Pro applications, you can apply what you learn with ClarisWorks to those products.

Quick Guide to ClarisWorks Publications

This book, *ClarisWorks Getting Started,* is one of several Claris publications designed to help you learn and use ClarisWorks.

ClarisWorks publications give you a choice of learning from a book or from computer-based instructions—or both. You'll find what you need in the comprehensive publications listed here.

ClarisWorks HyperTour

The *ClarisWorks HyperTour*® program gives you an onscreen introduction to ClarisWorks documents, with animated examples that illustrate how different document types work together. The tour also demonstrates the range of projects you can undertake with ClarisWorks.

ClarisWorks Getting Started

ClarisWorks Getting Started shows you how to install and start the application and provides a step-by-step tutorial. The tutorial introduces you to significant features and explains how ClarisWorks documents work.

ClarisWorks Help

ClarisWorks Help gives you onscreen instructions and reference information you can use while you're working with ClarisWorks documents. Because the system is computer-based, you can easily search for topics and move quickly from one topic to another. The help system covers selected topics, including spreadsheet and database functions used in most ClarisWorks environments.

ClarisWorks Handbook

The *ClarisWorks Handbook* gives concise, step-by-step instructions for doing work in ClarisWorks documents. The handbook also provides reference information you need for power work, such as complex database searches and macro-building.

ClarisWorks Communications Handbook

The *ClarisWorks Communications Handbook* gives easy step-by-step instructions for connecting to online information services and bulletin boards. The handbook also provides reference information for changing connection, terminal emulation, and file transfer tools. A glossary gives definitions of communications terms you may need to know.

ClarisWorks Quick Reference Guide

The *ClarisWorks Quick Reference Guide* summarizes keyboard shortcuts and provides brief how-to instructions for commonly used functions.

About This Book

This book provides installation instructions and a tutorial.

Instructions

Step-by-step instructions are introduced with a "To Do" heading." For example:

To create a new record

Numbered or single-step procedures follow these special headings.

Notes

Especially important information is presented in the form of notes. A diamond symbol precedes these notes. For example:

- **Different Starting Number** You can change the starting number for footnotes. For information, see the ClarisWorks Handbook.

Special Terms

You may occasionally encounter a specialized term you don't recognize. You can look up most such terms in the Glossary, which comes just before the index at the back of the manual.

Words that appear in **boldface** in this book appear in the Glossary.

Where to Go from Here

For instructions on installing ClarisWorks and an introduction to the tutorial, turn to chapter 1 now.

If you're an experienced user, you may wish to go directly to chapter 2, the beginning of the tutorial.

Chapter 1

Installing ClarisWorks

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Chapter 1

Installing ClarisWorks

This chapter provides step-by-step instructions for installing ClarisWorks and associated files on your Macintosh.

- **Important** The instructions given here assume that you've looked at the *Macintosh Basics* tour disk (a publication of Apple Computer, Inc.) which covers standard mouse techniques such as clicking and dragging.

The instructions also assume that you've reviewed *Getting Started With Your Macintosh* (also an Apple publication). If you find you need more information about mouse techniques, working with disks, or making copies of documents and disks, see *Getting Started With Your Macintosh.*

What's on the ClarisWorks Disks

ClarisWorks comes with six disks:

- *Installer*—Contains the software you need to install the ClarisWorks application and to open and save documents in different formats.
- *Program*—Contains the ClarisWorks application and a folder for use with the tutorial.
- *Communications*—Contains the ClarisWorks communications tools.
- *Help*—Contains the ClarisWorks Help system and the software you need to use it.
- *References*—Contains dictionaries used for the spelling checker and thesaurus.
- *HyperTour*—Contains a HyperCard introduction to the ClarisWorks program.

For information on where all these files go when you install them, see "Where Everything Goes," near the end of this chapter.

What You Need

To install and use ClarisWorks, you need the following equipment and software:

- Any Macintosh computer with at least one megabyte of memory.
- Macintosh system software version 6.0.5 or higher, or system 7 software. With system 7, you can take advantage of balloon help, a supplement to ClarisWorks Help.
- A hard disk, internal or external. You can use ClarisWorks with two 3.5-inch disk drives, but Claris strongly recommends a hard disk. You must have a hard disk to use ClarisWorks communications tools.

Before You Begin

Before you begin the installation process, take a moment to copy and register your new software.

Making Backup Copies

To protect your software, make backup copies of all the ClarisWorks disks before you start the installation procedure. If you need information on copying disks, see *Getting Started With Your Macintosh.*

After you've made backup copies, store the original disks in a safe place, and use the copies for installation and everyday work.

- **Name Your Backup Copies** ClarisWorks will not recognize a disk if its name is different from the original.

Registering Your Software

As a registered ClarisWorks owner, you're eligible for special benefits:

- technical support
- software updates
- specially priced upgrades
- Claris product news

You also receive announcements of special promotions for future purchases of Claris products.

To register your software, complete and mail the owner registration card that comes with ClarisWorks.

Installing ClarisWorks on a Hard Disk

Follow these steps to install ClarisWorks and associated software on your hard disk. If you've used other Claris products, the procedure will be familiar.

1. Lock all the ClarisWorks disks (slide the locking tab on each disk so that the hole in the disk is open).
2. Switch your Macintosh on, if it's not already on.

- **Existing User Dictionary** The following installation procedure will place a file called "User Dictionary" in a folder called "Claris" inside your System folder. If you have previously installed another Claris product, you may already have a "User Dictionary" file in a Claris folder. If so, rename the

existing user dictionary before you proceed so it is not erased during installation.

3. **When the desktop appears, insert the Installer disk into the 3.5-inch disk drive.**

   You see the Installer window on the screen (figure 1-1). If for any reason you see only the Installer disk icon, double-click the icon to open the window.

Figure 1-1
Contents of the Installer disk

Installer icon

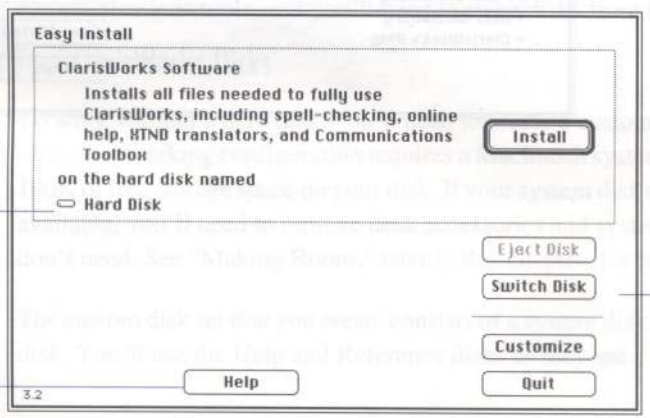
4. **Double-click the Installer icon.**

   In a moment, you see a ClarisWorks welcome screen.

5. **Click OK to proceed.**

   ClarisWorks opens the Easy Install dialog box (figure 1-2).

Figure 1-2
Preparing to install ClarisWorks



Name of disk where installation will take place

Click to install on a different disk

Click to read additional instructions

6. **If the name of the hard disk you want doesn't appear, click Switch Disk to find it.**

   If the disk you switch to is not a hard disk, or if it doesn't have enough space available, the Install button is dimmed. The dialog box tells you why you can't install onto that disk.

7. **If you want to install everything, skip directly to step 10.**

8. **If you don't want to install the Communications Tool Box, click Customize.**

   You see the Custom Installation dialog box (figures 1-3 and 1-4).

9. **Select the items you want to install.**

   Hold down the Shift key as you click to select multiple items at once, as shown in figure 1-3.

   When you select an item, the Installer adds the item to a list in the lower left corner of the dialog box.

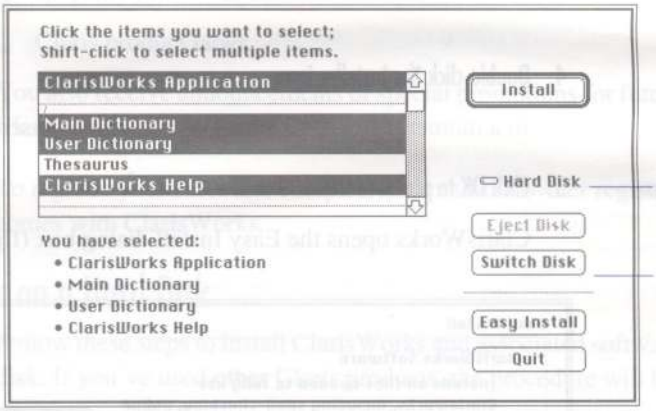
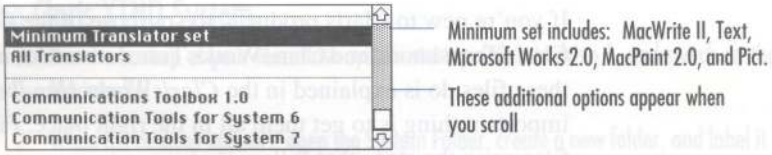


Figure 1-3
Selecting items for custom installation

Figure 1-4
More installation options


Minimum Translator set
All Translators
Communications Toolbox 1.0
Communication Tools for System 6
Communication Tools for System 7
Minimum set includes: MacWrite II, Text, Microsoft Works 2.0, MacPaint 2.0, and Pict.
These additional options appear when you scroll

10. **Click Install.**

    The Installer begins moving files onto your hard disk. A dialog box informs you of progress.

    If the current disk doesn't have enough space for the option you select, the Macintosh alerts you.

11. **When the Installer ejects a disk, insert the other disks as you are asked for them.**

    A dialog box tells you which disk to insert. Click Stop if you want to cancel the installation process..

12. **When you see the "Installation was successful" message, click Restart to leave the Installer and restart your Macintosh.**

    You see the ClarisWorks folder, which contains the application.

Using Two 3.5-Inch Disk Drives

You can use ClarisWorks with two 3.5-inch disk drives and no hard disk, but you'll sacrifice certain features. For example, you can't use the communications tools, and you'll need to swap disks from time to time.

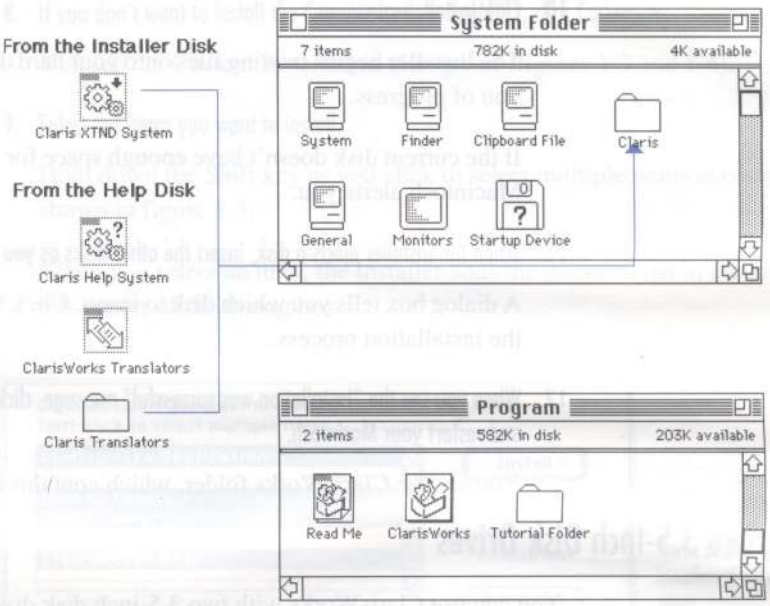
Customizing Your ClarisWorks Disks

To work without a hard disk, you'll need to create a custom set of disks. The minimum working configuration requires a Macintosh system disk with at least 100K of free storage space on your disk. If your system disk doesn't have 100K available, you'll need to remove desk accessories and system resources you don't need. See "Making Room," later in this chapter, for suggestions.

The custom disk set that you create consists of a system disk and an application disk. You'll use the Help and Reference disks as they are.

If you're new to Claris products, the purpose of the Claris XTND System, Claris Translators, and ClarisWorks Translators files may baffle you. The work these files do is explained in the *ClarisWorks Handbook*. For now, the important thing is to get them all in the right place. Figure 1-5 shows where files go in the steps that follow.

Figure 1-5
File destinations



- **Keeping Disk Drives Straight** In the following steps, "drive 1" refers to the 800K or 1.4MB floppy disk drive on your Macintosh. On a Macintosh II with two 3.5-inch floppy disk drives, drive 1 is on the right. "Drive 2" refers to an external 3.5-inch disk drive. On a Macintosh II with two 3.5-inch disk drives, "drive 2" is on the left. For other disk drive configurations refer to your Macintosh owner's guide.

Installing the Claris XTND System

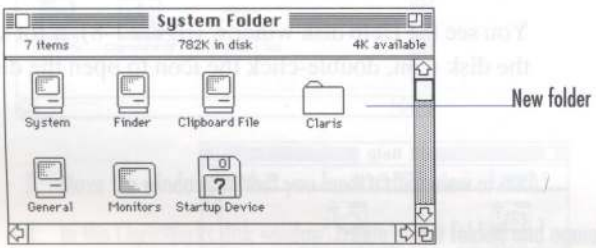
1. **Insert a backup of your Macintosh system startup disk into drive 1, and switch on the Macintosh.**
2. **When the desktop appears, open the System Folder, create a new folder, and label it "Claris" (don't use the quotation marks).**

   If you already have a Claris folder, you'll replace the existing XTND system with the current version.

3. **Leave the System Folder open so that you can see the Claris folder.**

   Figure 1-6 shows a System Folder. Yours will probably look different.

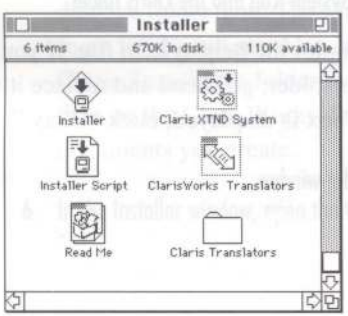
Figure 1-6
New Claris folder



4. **Insert the Installer disk into drive 2.**

   You see the Installer disk window (figure 1-7). If for any reason you see only the Installer disk icon, double-click the icon to open the window.

Figure 1-7
Installer disk window



5. Move the Installer window, if necessary, to one side or down, so that you can see the Claris folder in the System Folder window.
6. Drag the Claris XTND System icon from the installer disk into the new Claris folder on the system disk.

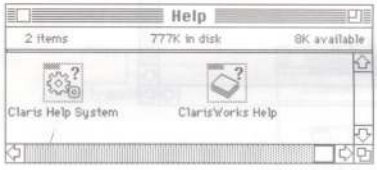
   The Macintosh copies the file into the Claris folder. If you see a message that indicates there's not enough room for everything on the system disk, see "Making Room," at the end of these steps.

Installing the Help System

1. Eject the Installer disk from drive 2.
2. Insert the Help disk into drive 2.

   You see the Help disk window (figure 1-8). If for some reason you see only the disk icon, double-click the icon to open the disk window.

Figure 1-8
Help disk window



3. Move the windows, or resize (or both) if necessary, so that you can see both the Claris folder in the System Folder window and the Claris Help System icon in the other window.
4. Drag the Claris Help System icon into the Claris folder.

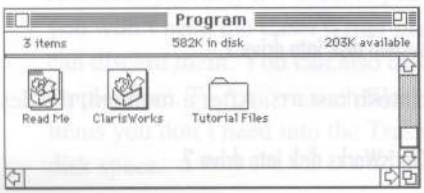
   The Macintosh copies the help system file. If you already have a help system in a Claris folder, go ahead and replace it with the new version. When the dialog box is displayed, click "Okay."
5. Close the System Folder window.

Installing Translators

1. Eject the system disk from drive 1, and eject the Help disk from drive 2.
2. Insert the Installer disk into drive 1 and the ClarisWorks disk into drive 2 and, if necessary, open the disk windows.

   You see the contents of the Program disk window (figure 1-9) and the Installer window. You'll need the Tutorial Folder to work through the rest of *ClarisWorks Getting Started*, so leave it on the program disk for now. Later, you can discard the folder or copy it onto another disk.

Figure 1-9
ClarisWorks disk window



3. Move the windows so that you have a clear view of each.
4. In the ClarisWorks disk window, create a new folder, and name it "Claris Translators" (don't use the quotation marks).
5. Drag the ClarisWorks Translators file from the Installer window into the ClarisWorks disk window.

   If you're using 1.4MB disk drives, you may have room for all the translators. Try selecting them and dragging them all into the folder, or just drag the folder over. The Macintosh will alert you if you don't have enough room for the full set. Also, with 1.4MB drives, you may be able to place the Claris Translators folder in the Claris folder on your system disk, rather than on the ClarisWorks disk. This leaves the ClarisWorks disk free for documents you create.
6. In the Installer window, open the Claris Translators folder.

7. **Select only the translators you need, and drag the icons into the new Claris Translators folder in the disk window.**

   The Macintosh copies the files. You may need to swap disks to complete the procedure. You'll be prompted when the need arises.

8. **Close the Claris Translators folder.**
9. **Choose Restart from the Special menu.**

   The Macintosh ejects the Installer and ClarisWorks disks.

Finishing Up

1. **Insert the system disk into drive 1.**

   The Macintosh restarts. After a moment, the desktop appears.

2. **Insert the ClarisWorks disk into drive 2.**
3. **When the ClarisWorks disk icon appears, double-click the icon to open the ClarisWorks window.**

   You're now ready to use ClarisWorks (see chapter 2). As noted earlier, you'll need to swap disks occasionally as you use the application. When you open Help, for example, ClarisWorks will ask you to insert the Help disk. Keep the backup set of disks near the computer so that you can get to them quickly.

Making Room

If the system file on your startup disk is very large, you may need to remove some items to make room on the disk. Or, you may not have room on the ClarisWorks or system disk for all the ClarisWorks translators. Here are some suggestions on how to make more room to work.

- **Reminder** Be sure you work from backup disks, not from the originals.

1. **Clear out fonts, desk accessories, control panels, or startup documents you don't need.**

   Use Font/DA Mover to eliminate any unnecessary fonts and desk accessories under versions of system 6. See the *Macintosh Utilities User's Guide* for instructions on removing fonts, desk accessories, control panels, or startup documents. If you are using system 7 remove unnecessary items from the System File, Apple Menu, control panels, and Extension folders.

2. **Remove printer and network resources you don't need.**

   When Macintosh system software is installed, it comes with software resources you may not need. If you're using an ImageWriter, for example, you won't need the LaserWriter printer resource or PrintMonitor, so you can discard them. You can also discard network resources such as AppleShare. To remove such files, open the System Folder and drag the items you don't need into the Trash. Then empty the Trash to free up the disk space.

3. **Remove translators you don't need.**

   Translators are programs that allow you to open documents created in applications other than ClarisWorks. If you have no documents in certain applications, you won't need the corresponding translator. For example, you may wish to open MacWrite II documents, but not Microsoft Works documents. You can discard the Microsoft Works translator.

   To limit the number of translators, copy only the ones you need when you're working through the installation process. The installation procedure tells you when to copy the translators.

Adjusting Memory

The Macintosh has a finite amount of memory that it sets aside for each application. When you start ClarisWorks, the application tells the Macintosh how much memory needs to be reserved for the application. If you're using system 7 software, or MultiFinder with system 6.0.5 software, you may need to change the amount of memory reserved for ClarisWorks.

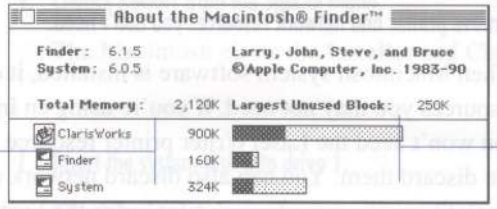
The following steps summarize the process of adjusting memory. For complete information on technical aspects of Macintosh memory and memory adjustment, refer to the *Macintosh Utilities User's Guide.*

Checking Memory Use

1. From the Macintosh desktop (the Finder screen), choose About the Finder, if you're using system 6, or About This Macintosh if you're using system 7.

   You see a system information window (figure 1-10). The window on your screen will probably look different.

Figure 1-10
System Information window



   In figure 1-10, 1,024K of memory is reserved for ClarisWorks. Later on, if you're working on a large spreadsheet or complex newsletter or want to work on multiple files, you may need to change the amount.

2. Close the system information window (click the close box).

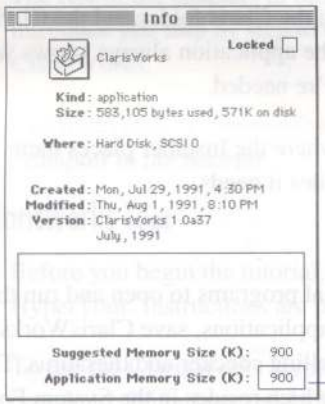
   You can open this window at any time to see how the Macintosh is managing the memory.

Adjusting Memory

1. If ClarisWorks is open, quit the application.
2. On the desktop, open the ClarisWorks folder and click the ClarisWorks application icon to select it.
3. Choose Get Info from the File menu.

4. You see the Info window for the application (figure 1-11).

Figure 1-11
Adjusting application memory


Info
Locked
ClarisWorks
Kind: application
Size: 583,105 bytes used, 571K on disk
Where: Hard Disk, SCSI 0
Created: Mon, Jul 29, 1991, 4:30 PM
Modified: Thu, Aug 1, 1991, 8:10 PM
Version: ClarisWorks 1.0a37
July, 1991
Suggested Memory Size (K): 900
Application Memory Size (K): 900
Memory to be set aside for ClarisWorks

5. Select the Application Memory Size box and type a number to change the memory size.
6. Close the information window.

The next time you start ClarisWorks, the specified amount of memory will be available for the application.

Here are some guidelines on memory settings. If you plan to work on an especially large document, you might double the size, increasing it from 1024K to 2048K. To open the application at this size, you would need at least 4MB of RAM, or system 7 with 2MB of RAM and virtual memory of 4MB or more.

If you're using a Macintosh with 1 or 2MB of RAM or running System 6, you may need to set the memory at 768K, and not run MultiFinder.

◆ **Reminder** Macintosh memory is discussed in detail in the *Macintosh Utilities User's Guide.*

Where Everything Goes on a Hard Disk

When you install ClarisWorks files on a hard disk, the Installer places the files in two different folders: the Claris folder and the ClarisWorks folder. As you work in ClarisWorks, the application always knows where to look for the various files when they're needed.

It's best to leave files where the Installer places them. That way, ClarisWorks can't lose track of the files it needs.

What Goes in the Claris Folder

ClarisWorks uses special programs to open and run the help system, import documents from other applications, save ClarisWorks documents in different formats, and run the spelling checker and thesaurus. These programs go into a folder called "Claris," which resides in the System Folder.

The ClarisWorks Installer creates a Claris folder for you if you don't already have one in your System Folder. The following files are placed in the Claris folder at installation:

- Claris Help System (the software used to open and use ClarisWorks Help)
- ClarisWorks Help
- Main Dictionary (the primary dictionary used by the spelling checker) and User Dictionary (a custom dictionary you use for your own specialized terms)
- US Thesaurus
- ClarisWorks translators, Claris translators, and the Claris XTND system (software that allows you to open and save documents in various formats)

What Goes in the ClarisWorks Folder

The Installer also creates a ClarisWorks folder for you on your hard disk. After installation, the ClarisWorks folder contains the following items:

- ClarisWorks (the application)
- Tutorial Folder (contains files used for the tutorial)
- Read Me file (contains last-minute changes that missed the Claris printing deadline)

Learning ClarisWorks

The rest of the chapters in this book are in tutorial form. These chapters introduce you step by step to the basic skills you'll need to work with ClarisWorks.

Claris strongly recommends that you use your Macintosh to work through the examples in the tutorial.

Taking the ClarisWorks Tour

Before you begin the tutorial, take a few minutes to run the ClarisWorks HyperTour. Instructions are printed on the HyperTour disk label.

To use the ClarisWorks HyperTour, you need the HyperCard application (version 1.2.5 or later) and a Home stack. For information about HyperCard and the Home stack, see the *HyperCard User's Guide* that came with your Macintosh.

You can run the tour directly from the HyperTour disk if you wish. If you're using a hard disk, copy the tour onto the hard disk for optimum performance.

Working Through the Tutorial

In the tutorial, you'll work through a series of examples that give you practical experience using ClarisWorks documents and features. The tutorial does more than teach you about software features. For example:

- Working through the tutorial gives you a chance to get comfortable with the application before you tackle major jobs on your own.
- The tutorial demonstrates a routine process of working with ClarisWorks documents: how to start a project, how to proceed, and how to finish the job.
- Through the various examples, the tutorial shows you how much you can accomplish, and the variety of work you can do, when you use ClarisWorks.

Don't worry if you've never used a computer before. You'll soon find yourself as comfortable with the Macintosh—and ClarisWorks—as you are with pencil and paper.

Guide to the Tutorial

The tutorial is broken up into six sessions (chapters 2 through 7). Each session is designed to help you become familiar with a certain aspect of ClarisWorks. In most sessions, you can either start work on your own project or use the sample information provided.

- **Chapter 2** introduces concepts and terms you'll need for the remaining sessions. You'll also learn how to open and use the ClarisWorks online help system.
- **Chapter 3** takes you through the process of creating and working with a word processing document, using a typical memo as a starting point.
- **Chapter 4 u**ses a graphics document to show you how to create a letterhead and save the letterhead as ClarisWorks stationery.
- **Chapter 5** introduces you to a spreadsheet document, using a simplified quarterly business report as an example.
- **Chapter 6** introduces you to a database document, using an invoice form and mailing list as an example.
- **Chapter 7** introduces you to advanced ClarisWorks features, including linked text frames and spreadsheet frames, using a newsletter as an example. If you're not yet familiar with frames, see the Glossary for a brief definition.

◆ **Different Monitors** If you have a large-screen monitor, your view of documents may be different from the view shown in figures in this book. You can adjust the size of the ClarisWorks window to match the screen size shown in the figures. Some tutorial steps, such as scrolling through a document, won't be necessary if you have a large screen and don't adjust the window size.

Chapter 2

A First Look at ClarisWorks

Starting ClarisWorks	2-3	Zooming In and Out	2-14
Personalizing Your Software	2-3	Hiding the Tools	2-16
About the Sample Document	2-6	Changing Your Mind	2-17
Understanding Objects	2-7	Understanding Document Types	2-17
Drawing Objects	2-9	Creating a New Document	2-21
Midway	2-12	Closing the Practice Documents	2-22
Using Help as You Work	2-12	Wrapping Up Chapter 2	2-23

Chapter 2

A First Look at ClarisWorks

This chapter, the first session in the tutorial, introduces you to ClarisWorks Help, orients you to basic concepts, and gives you some direct experience working with onscreen elements such as objects and windows.

In this chapter you'll learn how to

- start ClarisWorks and open an existing document
- use the ClarisWorks online help system
- create and manipulate objects
- create new documents of different types
- change your view of a document and stack windows for easy access
- save and close a document

Starting ClarisWorks

To get started on the tutorial, you'll first start the application and then open a sample document.

To start (hard disk)

1. If your Macintosh is off, switch it on.

   On the desktop, you see the ClarisWorks folder.

2. Double-click the ClarisWorks folder to open the folder window.
3. Double-click the ClarisWorks application icon.

   After a moment you see the Personalize dialog box (figure 2-1, a little later).

To start (two 3.5-inch disk drives)

1. With the system disk in the first disk drive, switch on the Macintosh.

   If you left the Macintosh on and the disks in place at the end of installation, skip to step 4.

2. Insert the ClarisWorks disk into the second disk drive.

   After a moment, you see the ClarisWorks disk icon beneath the system disk icon.

3. Double-click the ClarisWorks disk icon to open the disk window.
4. Double-click the ClarisWorks icon.

   After a moment you see the Personalize dialog box (figure 2-1, a little later).

Personalizing Your Software

In the dialog box shown in figure 2-1, ClarisWorks asks you to supply your name, company name if applicable, and software registration number. You need to go through this procedure only once, the first time you use ClarisWorks.

A blinking insertion point in the Name box indicates that you can type information in the box.

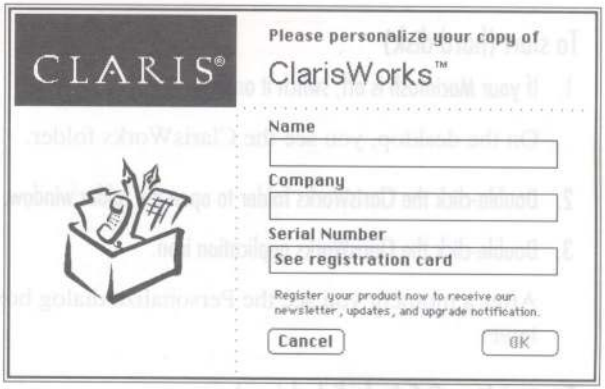


Figure 2-1
Personalizing your copy

To personalize your software

1. **In the Name box, type your name and press the Tab key.**

   The insertion point moves to the next box down.

2. **Type your company name, if appropriate, and again press Tab (you can put your address in the box, if you like, or leave the box blank).**

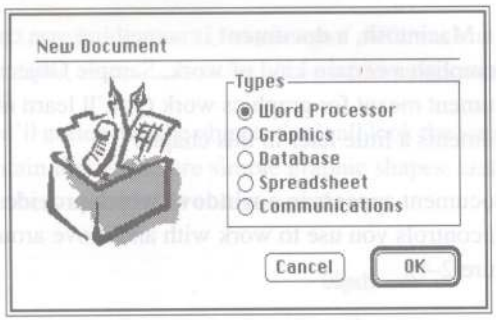
3. **Type the serial number from your ClarisWorks registration card.**

   Check your typing carefully. If you find a mistake, press Tab to move through the boxes, press the Backspace or Delete key to erase a mistake, and type the information again. You can't change the name, company, or serial number after you leave this dialog box.

4. After making sure everything you typed is correct, click OK.

   In a moment you see the New Document dialog box (figure 2-2). You'll learn more about this dialog box later.

Figure 2-2
New Document dialog box



5. For now, click Cancel.

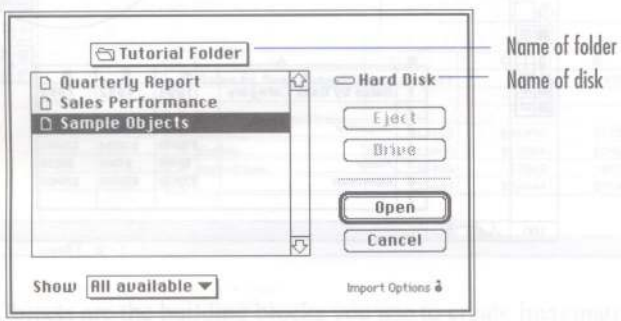
   The dialog box closes. You're now ready to open the first document for the tutorial.

To open the first tutorial document

1. Choose Open from the File menu.

   You see the Open dialog box (figure 2-3).

Figure 2-3
Opening the sample document



   Change folders until the Tutorial Folder is current. (For help with folders, see the *Macintosh Utilities User's Guide*.)

2. **Select the Sample Objects name and click Open (or double-click the name).**

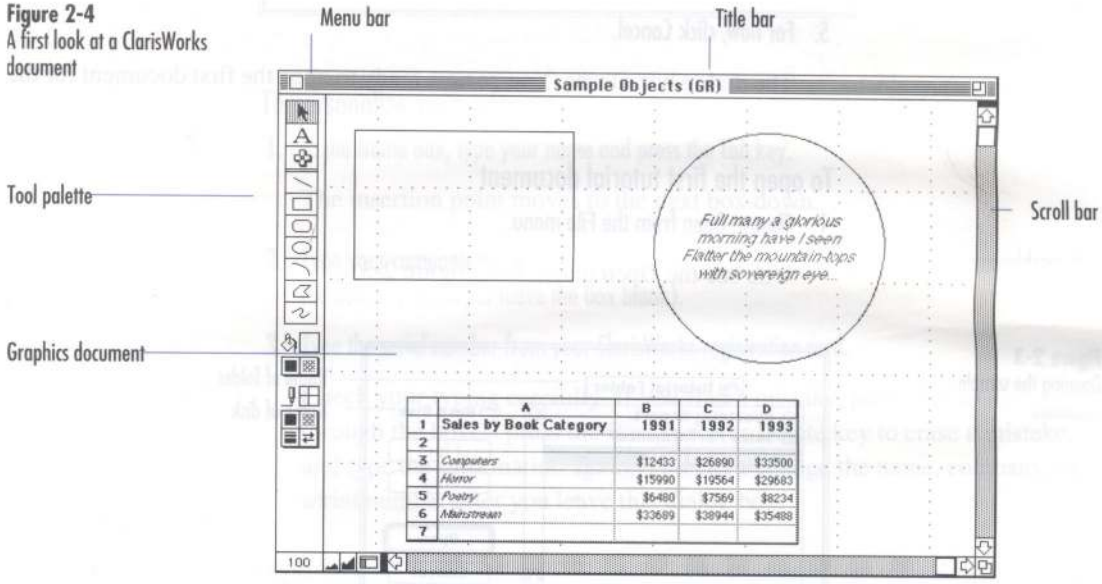
   Sample Objects, a ClarisWorks document, opens on the screen.

About the Sample Document

On a Macintosh, a **document** is something you create with an application to accomplish a certain kind of work. Sample Objects is a ClarisWorks graphics document meant for graphics work (you'll learn more about different types of documents a little later in this chapter).

A document appears in a **window,** which provides various tools, menus, and controls you use to work with and move around in the document itself (figure 2-4).

Figure 2-4
A first look at a ClarisWorks document



	A	B	C	D
1	Sales by Book Category	1991	1992	1993
2				
3	Computers	$12433	$26890	$33500
4	Horror	$15990	$19564	$29683
5	Poetry	$6480	$7569	$8234
6	Mainstream	$33689	$38944	$35488
7				

Take a moment to look at figure 2-4 and compare it with your screen. The scroll bars, menu bar, and the title bar of the document will be familiar to you from your review of *Getting Started With Your Macintosh.*

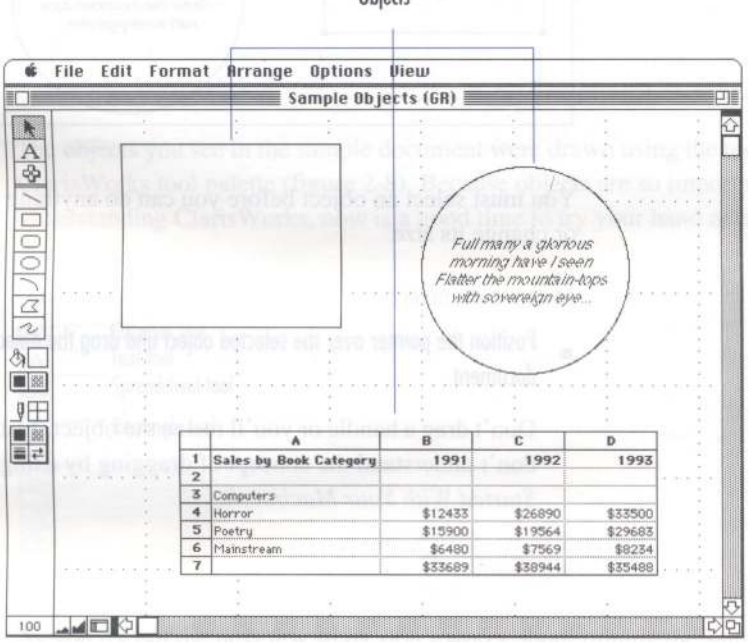
On the left you see something a little different. This is the ClarisWorks tool palette, which contains the tools you use to work with graphics elements—elements like the shapes you see in the sample document.

Understanding Objects

The sample document is made up of different kinds of **objects**—elements you can draw, select, and move about within a document.

You'll notice that the objects don't all look the same (figure 2-5). Some of them contain text, some are simple graphic shapes, and one of them has text and numbers arranged in columns and rows.

Figure 2-5
A first look at objects


Objects
File Edit Format Arrange Options View
Sample Objects (GR)
Full many a glorious morning have I seen
Flatter the mountain-tops with sovereign eye...
A B C D
1 Sales by Book Category 1991 1992 1993
2
3 Computers
4 Horror $12433 $26890 $33500
5 Poetry $15900 $19564 $29683
6 Mainstream $6480 $7569 $8234
7 $33689 $38944 $35488
100

Objects are the building blocks you use to create imaginative pages and to present different types of information in different ways. You'll learn more about objects in chapter 4.

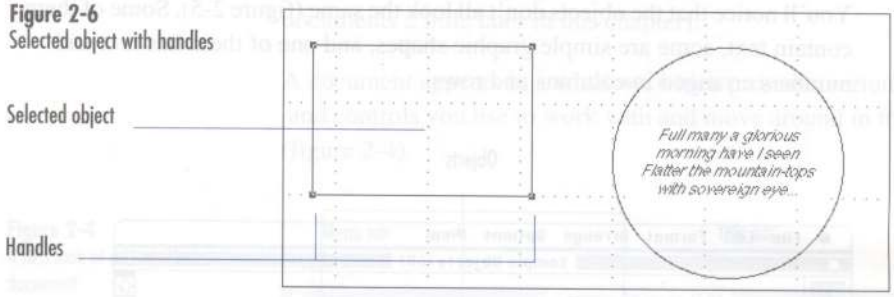
For now, you may find it helpful to practice a few basic maneuvers.

To select an object

- Click any one of the objects.

The object you clicked should now have **handles**—black squares at the edges of the object's boundary (figure 2-6). Handles indicate that an object is selected. If you don't see any handles, try clicking again. If you need help understanding selection, see *Getting Started With Your Macintosh.*

Figure 2-6
Selected object with handles



You must select an object before you can do anything with it, such as move it or change its size.

To move an object

- Position the pointer over the selected object and drag the object to a different spot in the document.

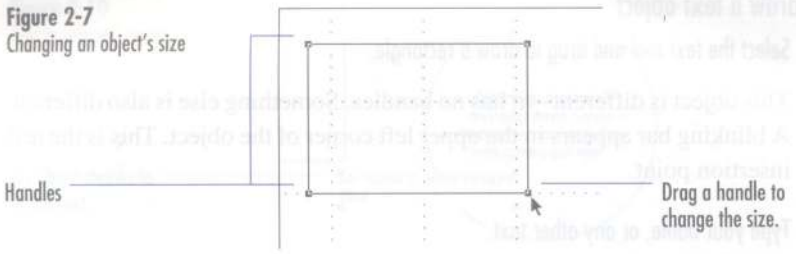
Don't drag a handle or you'll resize the object. Just move the object. If you don't understand the concept of dragging by using the mouse, see *Getting Started With Your Macintosh.*

To change an object's size

- Drag one of the handles outward from the object (figure 2-7).

The object becomes larger as you drag. If you drag the handle toward the middle of the object, the object gets smaller.

Figure 2-7
Changing an object's size



Drawing Objects

The objects you see in the sample document were drawn using the tools in the ClarisWorks tool palette (figure 2-8). Because objects are so important to understanding ClarisWorks, now is a good time to try your hand at creating them.

Figure 2-8
Closeup of the tool palette

As you try out the next few steps, don't worry about ruining the sample document. It's here to give you a chance to practice.

To draw a rectangle

1. **Select the rectangle tool and drag to draw a rectangle of any size.**

   Handles appear around the new object to show that it's selected. You can move the rectangle or resize it.

To draw a text object

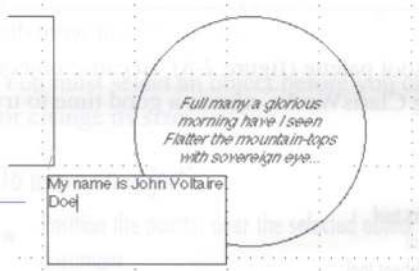
1. **Select the text tool and drag to draw a rectangle.**

   This object is different—it has no handles. Something else is also different: A blinking bar appears in the upper left corner of the object. This is the text insertion point.

2. **Type your name, or any other text.**

   The text appears in the object as you type (figure 2-9).

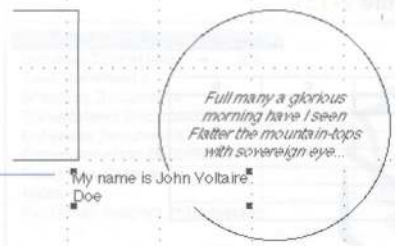
Figure 2-9
Typing text in an object



3. **Press the Enter key (not Return).**

   Now handles appear on the object, showing that it's selected. And, unless you drew a very small object, the object has shrunk to just the size of the text (figure 2-10).

Figure 2-10
Text in selected object



The object shrinks to fit the text.

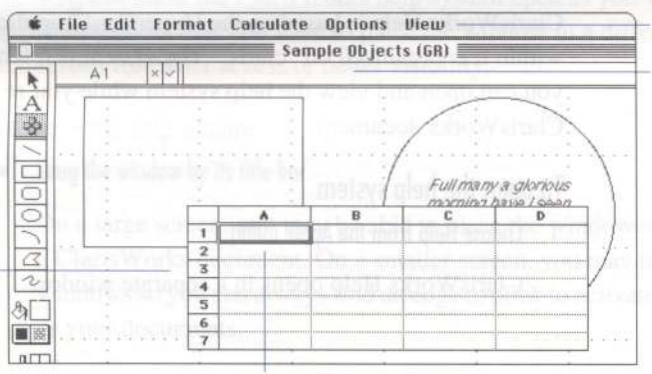
To draw a spreadsheet object

1. **Select the spreadsheet tool, and drag to draw a rectangle.**

   This object is different from the other two you drew. It contains columns and rows.

   One box at the top left of the object has a heavy border. The border indicates a selected cell. Notice also that a new panel has been added to the top of the document (figure 2-11). This is the **data entry bar** for the spreadsheet.

Figure 2-11
Spreadsheet object and data entry bar



Spreadsheet menus

Data entry bar

Spreadsheet object (frame)

Box with heavy border (a selected spreadsheet cell)

2. Type the year 1991.

   The number appears in the data entry bar as you type.

3. Press Tab.

   The number now appears in the box, and the heavy border has moved to the next box (figure 2-12).

Figure 2-12
Data in spreadsheet object

	A	B	C	D
1	1991			
2				
3				
4				
5				
6				
7				

In a later chapter, you'll learn more about spreadsheets. For now it's enough to know that an object can contain a spreadsheet. You can move or resize the spreadsheet object just as you can any other object.

Midway

You're now about midway through this session of the tutorial.

Before you proceed, take a moment to become familiar with the comprehensive online help system that comes with ClarisWorks.

Using Help as You Work

ClarisWorks Help is based on the HyperCard® application, so the information within it is organized on "cards." The system is referred to as **online** because you can open and view the help system while you're working with a ClarisWorks document.

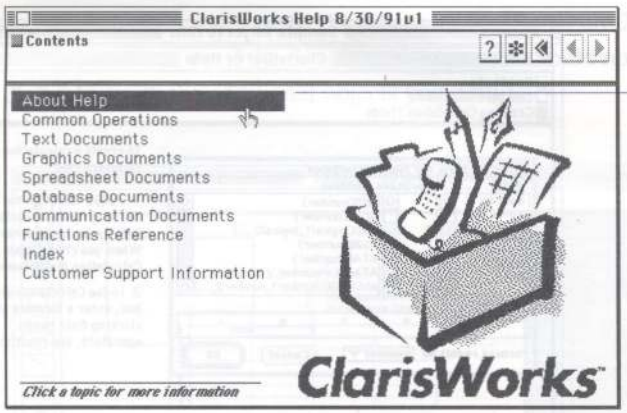
To open the help system

1. Choose Help from the Apple menu.

   ClarisWorks Help opens in a separate window.

The first card you see is the table of contents for the system (figure 2-13). Although what you see appears to be a list of words, each topic is in fact a button that will take you elsewhere in the help system.

Figure 2-13
Learning about Help



2. **Click About Help.**

   You immediately see instructions for using the help system.

3. **Follow the instructions in the About Help series, learning as you go.**

   Pay particular attention to the navigation buttons so that later, when you need help quickly, you can find your way on your own.

You can leave the ClarisWorks help system open as you work. You may find, though, that you want to place the window in a different spot on the screen for easier access or better visibility.

To move the help window

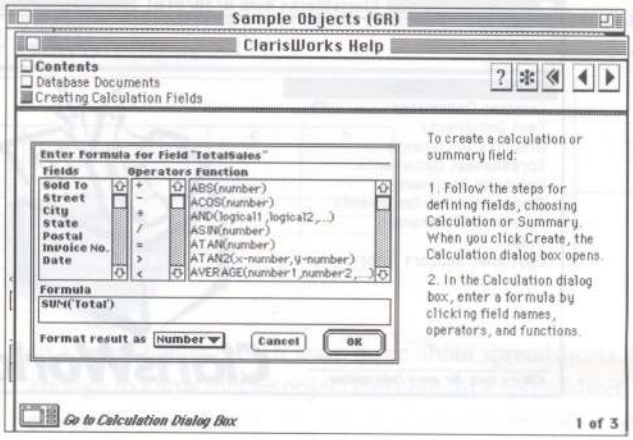
- **Drag the window by its title bar.**

  On a large screen, you may be able to place the window side by side with a ClarisWorks document. On a smaller screen, you may need to "stack" windows so you can always find an edge to click to activate the help system or your documents.

To stack the help window for quick access

- Drag the help window so just the top of the document shows (figure 2-14).

Figure 2-14
Arranging windows for quick access to Help



To switch from help to document

- Choose the document name from the View menu (or click an edge of the document).

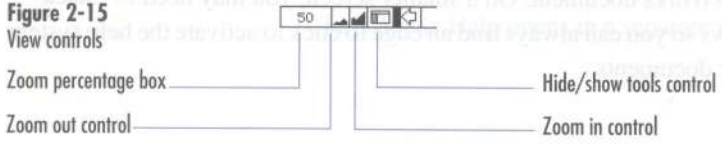
Using the View menu is helpful when you have many files or documents open and can't tell one edge from another.

Zooming In and Out

When you left the Sample Objects document, you had just finished drawing several objects. As you drew them, you probably noticed that you could see only part of the document. The document is larger than the screen.

To get an idea of how the whole document looks, you can use the view controls at the bottom of the window to zoom out for an overview (figure 2-15).

Figure 2-15
View controls



(To see the zoom controls, you may need to move the Help window.)

To zoom out

1. **Click the zoom out control once.**

   ClarisWorks reduces the document by 66.7% (figure 2-16). You can now see much more of the drawing. Your screen should now look like figure 2-16 (with the additional objects you drew).

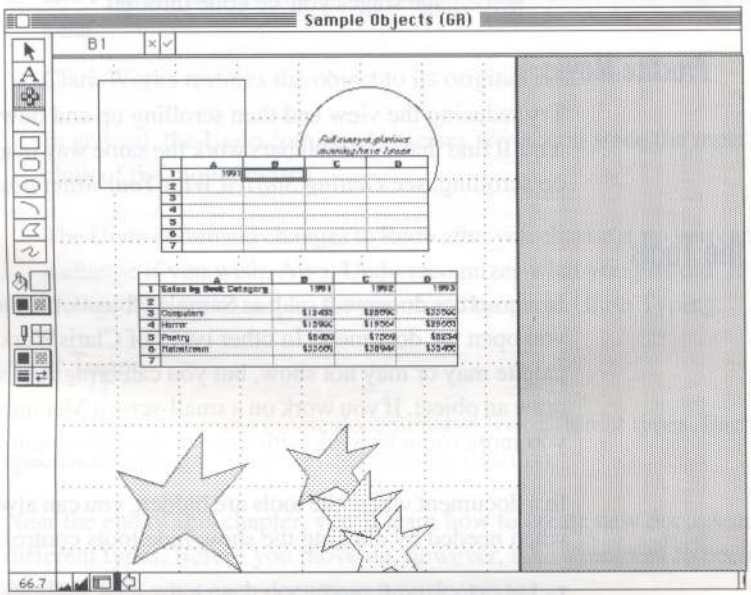


Figure 2-16
A zoomed-out view

   At the left of the zoom controls, the zoom percentage box now reads "66.7," indicating that the document is at a 66.7% reduction.

2. **Again click the zoom out control.**

   ClarisWorks further reduces your view of the document, giving you a bird's-eye view.

To zoom in

- Click the zoom in control.

  ClarisWorks enlarges the view.

To return to actual view (100%)

- Click the zoom percentage box once.

  ClarisWorks automatically returns to a 100% view, regardless of the percentage stages you've gone through.

Practice Moves

Try reducing the view and then scrolling up and down through the document. You'll find that the scroll bars work the same way in any view. For information on scrolling, see *Getting Started With Your Macintosh.*

Hiding the Tools

In a graphics document such as Sample Objects, the tool palette is present when you open the document. In other types of ClarisWorks documents the tool palette may or may not show, but you can bring it to view when you need it to draw an object. If you work on a small-screen Macintosh, hiding the tools gives you more room to work with the contents of a document.

In a document where the tools are hidden, you can always bring them into view when needed by clicking the show/hide tools control.

To hide ClarisWorks tools

- Click the show/hide tools control (shown in figure 2-15, earlier).

  The tools temporarily disappear, but return if you click the tool again.

  If you prefer to use a menu, you can choose Show Tools or Hide Tools from the View menu. The commands have the same effect as the show/hide tools control.

Changing Your Mind

As you work with ClarisWorks, you may move an object, revise some text, or take some other action you'd prefer to undo. It's easy to cancel an action, as long as you don't do something else before you change your mind.

To reverse an action

1. Resize any object in the document.
2. Before you take any other action with mouse or keyboard, choose Undo Resize from the Edit menu.

   ClarisWorks restores the object to its original size.

   In general, the Undo command reverses any action since the most recent click of the mouse button.

   The Undo command changes to Redo after you choose it, so you can restore a change if you wish. Also, Undo recognizes what you just did. If you change text, for example, the command becomes Undo Typing.

Understanding Document Types

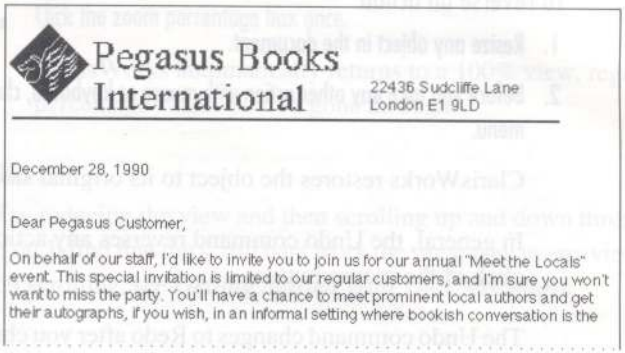
In ClarisWorks you can create documents of five different types. Each type is specifically designed for a certain primary function.

Near the end of this chapter, you'll learn how to create new documents of different types. Before you move on, however, take a moment to become familiar with what each document type does best.

Word Processing

A word processing document— also called a text document—is designed primarily for words (figure 2-17). The words can take the form of memos, letters, reports, book manuscripts, or anything else you can type.

Figure 2-17
Customer letter in a word processing document



Pegasus Books International

22436 Sudcliffe Lane
London E1 9LD

December 28, 1990

Dear Pegasus Customer,

On behalf of our staff, I'd like to invite you to join us for our annual "Meet the Locals" event. This special invitation is limited to our regular customers, and I'm sure you won't want to miss the party. You'll have a chance to meet prominent local authors and get their autographs, if you wish, in an informal setting where bookish conversation is the

For a professional look, you can use multiple columns, add footnotes, and add a header and footer. You're not limited just to text. For example, you can paste pictures, draw graphic shapes such as boxes or borders, add frames, or add charts created from data in a spreadsheet.

Graphics

A graphics document (figure 2-18) is an electronic drawing pad, and it's also much more. You can use a graphics document to lay out pages, such as those for a newsletter or brochure. You do this by drawing objects that contain text, drawings, or numbers.

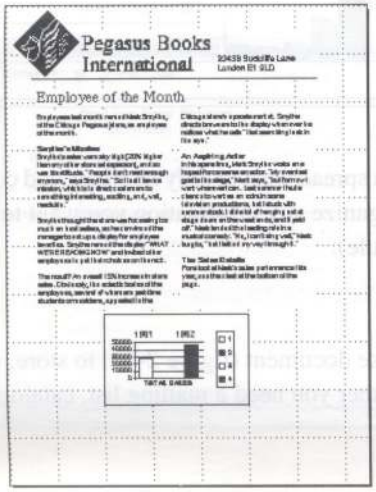
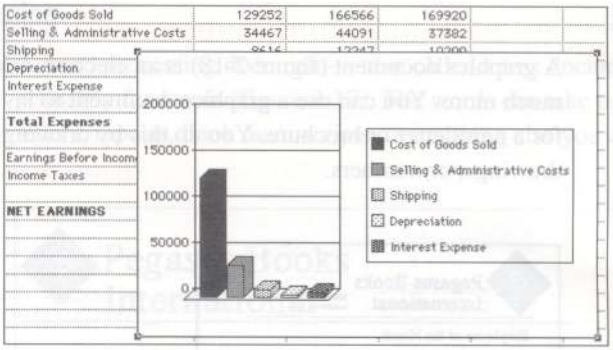


Figure 2-18
Newsletter in a graphics document

Spreadsheet

A spreadsheet document (figure 2-19) is like a columnar pad of paper, but much more versatile. You can transform numbers into pie, bar, and scatter charts that show financial or scientific trends and relationships in a way that figures can't.

Figure 2-19
Data and chart in a spreadsheet document



Most people use a spreadsheet to tally numbers and compute formulas, but you can use one to organize any information you want to present in columns (for example, a schedule).

Database

You use a database document (figure 2-20) to store, sort, organize, and find information, whether you need a mailing list, catalog, or an invoice/sales tracking system.

Figure 2-20
Information in a database document

Sales Report

Sold To	Item	Price	Quantity	Total
World of Books & Tapes	Encyclopedia Globus	$640.00	3	$1920.00
Delaware Books	Encyclopedia Globus	$640.00	2	$1280.00
Cook & Book Co.	Salutary Salads	$6.50	10	$65.00
		Total Sales	$3265.00	

Using a database layout, you can design different ways to present the same data. For example, you can organize the names and addresses you enter in a sales record for use in a layout for mailing labels.

Communications

A communications document (figure 2-21) conducts a communication session between you and an online information service or another computer. Depending on the service you choose, you can join online discussion groups, look up business or technical topics, send and receive electronic mail, shop, and book travel reservations

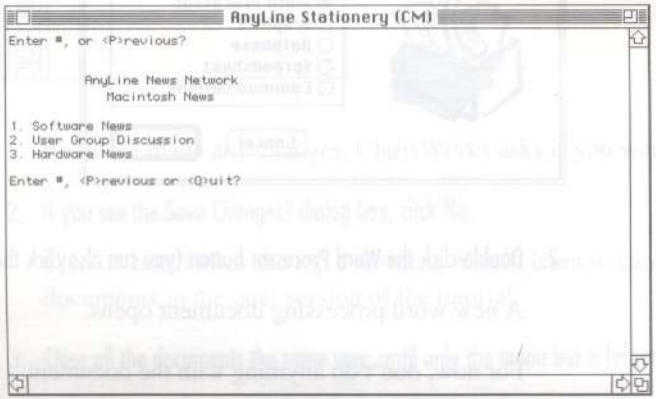


Figure 2-21
A communications document

Using ClarisWorks, it's easy to connect to an online service. You don't have to be a telecommunications expert or puzzle over a long technical manual. Most options are preset for you to use immediately.

Creating a New Document

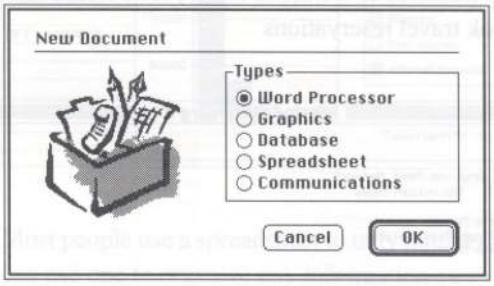
Now that you're familiar with the different types of documents available, you're ready to practice creating a few new ones. You'll need to know how to do this to work through the remainder of the tutorial.

To create a new document

1. **Choose New from the File menu.**

   You see the New Document dialog box (figure 2-22).

Figure 2-22
Creating a new document



2. **Double-click the Word Processor button (you can also click the button and then click OK).**

   A new word processing document opens.

   For now, don't do anything with the document.

3. **Again choose New from the File menu.**

4. **In the New Document dialog box, double-click the Graphics button.**

   A new graphics document opens on top of the word processing document. You can open as many documents as you have computer memory to accommodate.

   That's all you need to know for now about creating new documents. In each chapter of the tutorial you'll repeat this process as you open and explore each type of ClarisWorks document.

Closing the Practice Documents

You're near the end of chapter 2, so you can now close the Sample Objects document, any other documents you created, and the help system.

Chapter 3

Writing a Trip Report

Starting the Report	3-3	Inserting a Picture	3-11
Working with a New Page	3-3	Midway	3-13
Revising as You Write	3-6	Adding a Footnote	3-14
Adding New Information	3-7	Adding a Footer and Date	3-16
Writing Columnar Text	3-8	Checking the Spelling	3-17
Moving Text Around	3-9	Closing the Report	3-19
Changing the Indentation	3-10	Wrapping Up Chapter 3	3-19

Chapter 3

Writing a Trip Report

This chapter of the tutorial introduces you to ClarisWorks word processing (text) documents.

In this chapter you'll learn how to

- open a text document and write a report
- revise the text you write and change the text format
- add footnotes
- insert a picture
- check spelling
- save and close a document

Starting the Report

In this session of the tutorial, John Jones, a Pegasus Books International sales representative, is writing a trip report.

John decides to use a word processing document for his report, since the report will contain mostly text. Information for the report is provided at each step.

- **Important** In this session and throughout the tutorial, you can follow the examples or get right to work on your own documents. If you decide to create your own documents, use the examples as guidelines to the process of using ClarisWorks.

To start the report

- Start ClarisWorks, if necessary, and create a new word processing document (see chapter 2 for details on creating a new word processing document).

  In the title bar of the new document, you see the name "Untitled 1 (WP)." The *WP* stands for word processing. For brevity, a word processing document is referred to as a text document.

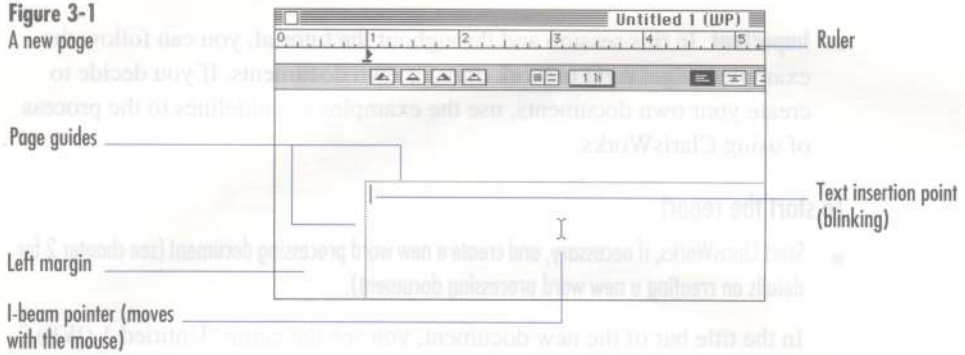
  Later in this chapter, you'll give the document a different name.

Working with a New Page

At the top of the new page (figure 3-1) you see the text ruler. You can ignore the ruler for now and simply focus on writing, which you'll begin in a moment.

Notice the vertical bar, the **text insertion point,** blinking in the upper-left corner of the page. To its left, and above it, you see light lines. These are the **page guides,** which indicate the boundaries of a text page. The **I-beam pointer** moves when you move the mouse. After you've typed some text, you'll use the I-beam pointer to set the insertion point somewhere else.

Figure 3-1
A new page



To write in the document

- **Type a few lines of text, but don't press the Return key at the end of a line.**

  You can use John Jones's report, which follows, or start working on your own report.

- **Use the Space bar to insert spaces between words; press Shift to type a capital letter.**

  The insertion point moves to the right as you type. When you reach the right margin, the last word is automatically carried down to a new line, in a process called **word wrap.**

John's First Paragraph

This year's New York Book Sales Fair turned out to be a good choice for promoting sales of franchise stores. To summarize, I have eight (yes, 8!) potential franchisees ready to come to London for serious screening and qualification interviews. That doesn't count six others who were interested but clearly classifiable as dreamers, not entrepreneurs.

To correct errors you make as you type

- Press Backspace or Delete to back up over the error, and retype the word or words.

Backspace and Delete are repeating keys. You can hold them down to backspace rapidly over several characters.

To start a new paragraph and insert a line of space

- Press the Return key twice.

The text insertion point moves down two lines and blinks.

To add more text

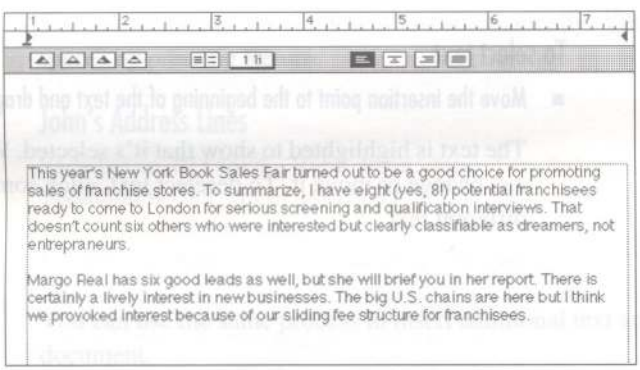
- Type another paragraph (again, use John Jones's words if you wish).

John's Second Paragraph

```
Margo Real has six good leads as well, but she will brief you
in her report. There is certainly a lively interest in new
businesses. The big U.S. chains are here but I think we
provoked interest because of our sliding fee structure for
franchisees.
```

The report should now look something like figure 3-2.

Figure 3-2
Beginning of a report


This year's New York Book Sales Fair turned out to be a good choice for promoting sales of franchise stores. To summarize, I have eight (yes, 8!) potential franchisees ready to come to London for serious screening and qualification interviews. That doesn't count six others who were interested but clearly classifiable as dreamers, not entrepraneurs.
Margo Real has six good leads as well, but she will brief you in her report. There is certainly a lively interest in new businesses. The big U.S. chains are here but I think we provoked interest because of our sliding fee structure for franchisees.

Revising as You Write

Right away, John notices a typing mistake in his report. He could correct it later when he checks the spelling but decides to fix the error now.

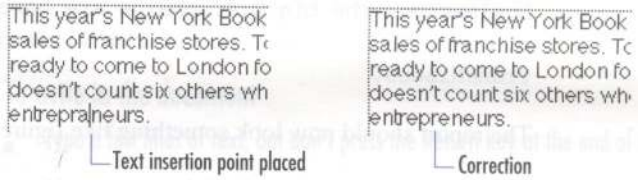
To correct an error after you've typed more text

1. **Move the I-beam pointer with the mouse to a position just to the right of the error and click once.**

   The text insertion point starts blinking where you clicked. If you don't get it in exactly the right place, move the I-beam pointer and click again. (If your typing was perfect, with no mistakes, practice moving the insertion point to correct future errors.)

2. **Press Backspace or Delete to erase the error, and retype the word (figure 3-3).**

Figure 3-3
Placing the insertion point in a different spot


This year's New York Book
sales of franchise stores. Tc
ready to come to London fo
doesn't count six others wh
entrepraneurs.
Text insertion point placed
This year's New York Book
sales of franchise stores. Tc
ready to come to London fo
doesn't count six others wh
entrepreneurs.
Correction

To select text

- **Move the insertion point to the beginning of the text and drag through the words.**

  The text is highlighted to show that it's selected. When text is selected you can change or move it. To deselect text, click somewhere else or select different text.

To change the type style of selected text

- Choose Italic from the Style menu.

The text changes to italic style (figure 3-4). You can change the font and size while the text is still selected by choosing from the Font and Size menus.

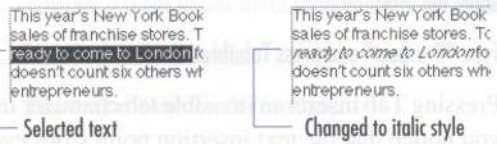

This year's New York Book
sales of franchise stores. T
eady to come to London fo
doesn't count six others wh
entrepreneurs.
Selected text
This year's New York Book
sales of franchise stores. To
ready to come to London fo
doesn't count six others wh
entrepreneurs.
Changed to italic style

Figure 3-4
Changing type styles

Adding New Information

After typing the first two paragraphs, John realizes that he needs to address his report.

To insert more text above what you've already typed

1. Move the insertion point to the immediate left of the first character in the report.
2. Type the additional text, pressing Return at the end of each line.

The rest of the text moves downward automatically. You can add line spaces by pressing Return.

John's Address Lines

```
Madeleine Gifford, Vice President for Sales
Pegasus Books International
22436 Sudcliffe Lane
London E1 9LD
```

You can use the same process to insert additional text anywhere in a text document.

Writing Columnar Text

To impress the home office, John decides to add some details on the prospects he's writing about. To do this, he types a small table and then edits it to make it look professional.

To create columnar text

1. Move the insertion point to the end of the text and press Return to begin a new line.
2. Type "Prospect" and press Tab three times.

   Pressing Tab inserts an invisible tab character in the text. As you press Tab, you notice that the text insertion point stops every half inch. The ruler is preset with tabs every half inch.

3. Type "Company" and press Return twice to add a blank line and begin a new line.
4. Type the first prospect and press Tab until the insertion point lines up under "Company."
5. Type the company name and press Return. Continue typing the prospect and company names in columns.

John's Table

Prospect	Company
Sylvia Waler	Waler Books
Mary Doe	Doe Unltd.
Walker Smith	Smith Books
Talia Bacherro	Talia Books
Marsh Rockworth	JRJ Design
Ted Uyeda	National Art
Maurice Rivera	Epp Book Co.

To make the top line bold

- Select the line and choose Bold from the Style menu.

The second column may move out of position. If so, you need to remove a tab.

To remove a tab

1. Move the I-beam pointer to the left of "Company" and click.
2. Press Backspace or Delete.

The text moves back into line.

Moving Text Around

After rereading the trip report, John decides to move a paragraph from above the table to below it (figure 3-5).

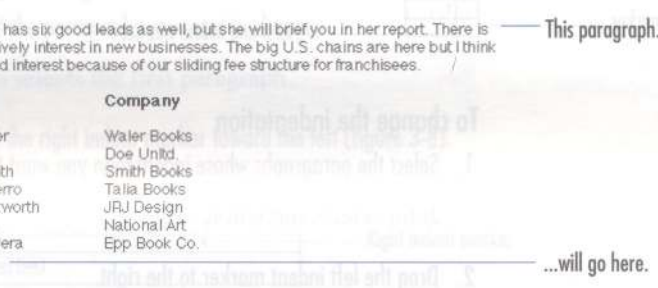

Margo Real has six good leads as well, but she will brief you in her report. There is certainly a lively interest in new businesses. The big U.S. chains are here but I think we provoked interest because of our sliding fee structure for franchisees.
This paragraph...
Prospect
Company
Sylvia Waler
Waler Books
Mary Doe
Doe Unltd.
Walker Smith
Smith Books
Talia Bacherro
Talia Books
Marsh Rockworth
JRJ Design
Ted Uyeda
National Art
Maurice Rivera
Epp Book Co.
...will go here.

Figure 3-5
Moving a paragraph

To move text

1. Select the text (a line, a paragraph, or several paragraphs) you want to move.
2. Choose Cut from the Edit menu.

The text is removed and a copy is placed on the Clipboard, a temporary storage place in the computer. The copy stays there until you cut (or copy) something else, or until you shut down the computer.

3. Place the insertion point where you want the text to go, pressing Return to create a new line.

4. Choose Paste from the Edit menu.

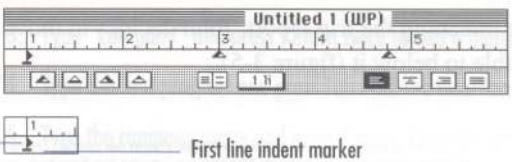
   The copy is pasted from the Clipboard into the new spot.

- **Copying** You use the same technique to copy and paste text. When you copy, the original text stays where it is, and a copy goes on the Clipboard. You can paste the copy elsewhere or in another document.

Changing the Indentation

John decides to change the indentation of the table to give it more emphasis. **Indentation**—the distance of text from the page guides—is controlled by two indent markers on the left side of the ruler (figure 3-6).

Figure 3-6
Changing the indent markers



To change the indentation

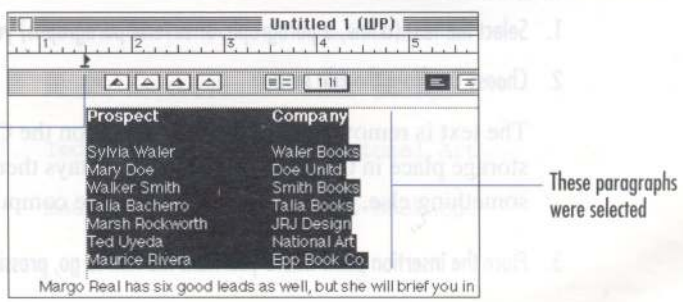
1. Select the paragraphs whose indentation you want to change.

   John selects the whole table.

2. Drag the left indent marker to the right.

   The left indent of the selected paragraph changes as you drag (figure 3-7).

Figure 3-7
Indenting the text



When you dragged the indent marker, you probably noticed that both indent markers moved. You can separate the two markers to change only the first line in a paragraph.

To change the indentation of the first line

1. **Select the paragraphs you want to change.**

   John selects the first paragraph.

2. **Drag the first line indent marker (the bar under the left indent marker) toward the right.**

   The left indent marker stays put, but the first line of the paragraph is indented to match the new ruler setting.

You can also change the right indent—the distance from the page guide of the text on the right margin.

To change the right indentation

1. **Select the paragraphs you want to change.**

   John selects the first paragraph.

2. **Drag the right indent marker toward the left (figure 3-8).**

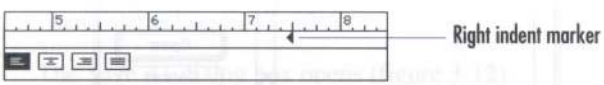


Figure 3-8
Right indent

If you don't see the marker, use the horizontal scroll bar to bring it into view. The text lines are shortened to match the new ruler setting.

Inserting a Picture

John's trip report looks fairly dull, so he decides to insert the Pegasus logo at the top of the page. He has a copy of the logo in a MacPaint® document.

To insert a picture

1. Place the insertion point on the line where you want the art to go (figure 3-9).

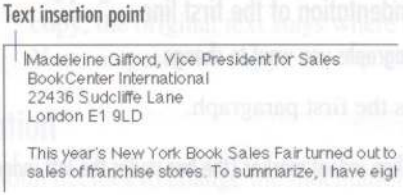

Text insertion point
Madeleine Gifford, Vice President for Sales
BookCenter International
22436 Sudcliffe Lane
London E1 9LD
This year's New York Book Sales Fair turned out to
sales of franchise stores. To summarize, I have eigh

Figure 3-9
Placing the insertion point

2. Choose Insert from the File menu.

You see the Insert Document dialog box (figure 3-10), with a list of document names. You may need to switch folders to find the art.

John opens the Tutorial Folder.

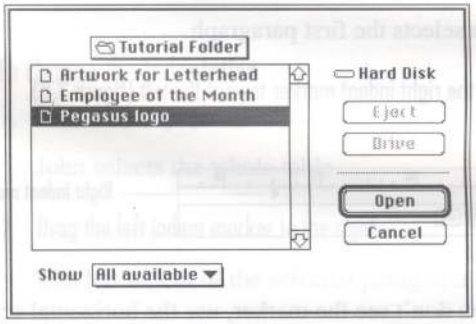
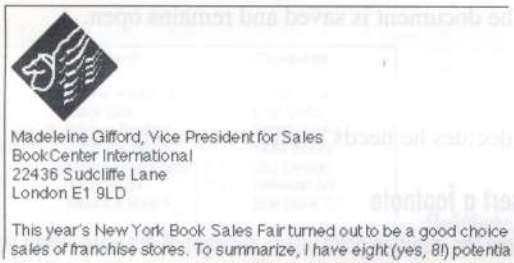


Figure 3-10
Opening a graphic image for insertion

3. **Double-click the name of the document you want.**

The contents of the document are placed at the insertion point (figure 3-11). John inserts the art called "Pegasus Logo."

Figure 3-11
Art inserted in the report


Madeleine Gifford, Vice President for Sales
BookCenter International
22436 Sudcliffe Lane
London E1 9LD
This year's New York Book Sales Fair turned out to be a good choice
sales of franchise stores. To summarize, I have eight (yes, 8!) potentia

Another way to add a picture is to copy the art and paste it into the document. Using the Insert command is much quicker.

Midway

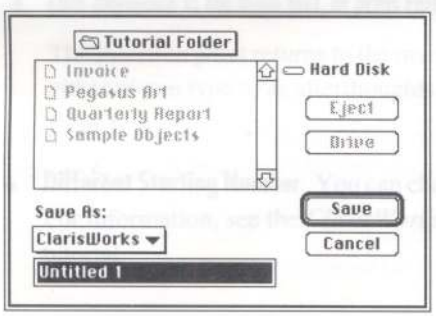
You're now about midway through this session of the tutorial. This is a good time to name and save your report.

To name and save the practice document

1. **Choose Save As from the File menu.**

The Save As dialog box opens (figure 3-12).

Figure 3-12
Saving the document



2. Type a name for the report in the Name box.

   John names his document "Trip Report 3/25/91."

3. Click Save.

   The document is saved and remains open.

Adding a Footnote

John decides he needs to add a note about one of the prospects.

To insert a footnote

1. Place the insertion point just to the right of the word where you want to place the footnote (figure 3-13).

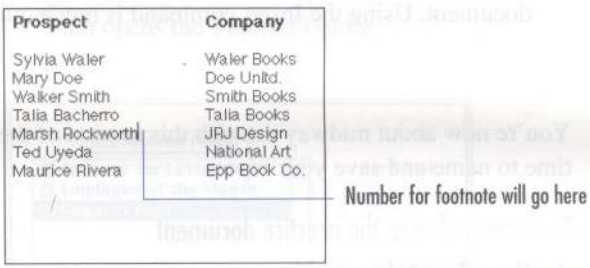
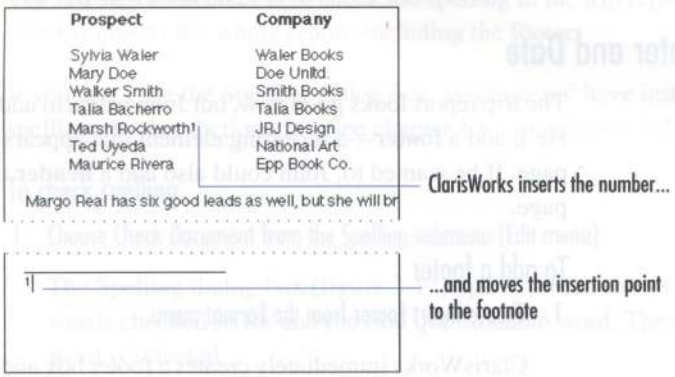


Figure 3-13
Placing the insertion point

2. **Choose Insert Footnote from the Format menu.**

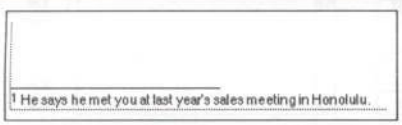
ClarisWorks inserts a number for the note and moves the insertion point immediately to the bottom of the page (figure 3-14). The number is in **superscript** style, which means it's raised above the main line of text.

Figure 3-14
New footnote



3. **Type the text of the note (figure 3-15).**

Figure 3-15
John's footnote



4. **Click anywhere in the main text, or press Enter.**

The insertion point returns to the main text. You can continue adding notes, either as you type or as afterthoughts. The notes are numbered sequentially from 1.

- **Different Starting Number** You can change the starting number for footnotes. For information, see the *ClarisWorks Handbook* after you finish the tutorial.

To delete a footnote

- Select the note number within the document (not in the footnote panel), and press Backspace or Delete.

  ClarisWorks deletes the note and its number and renumbers any remaining footnotes.

Adding a Footer and Date

The trip report looks good now, but John wants to add a few finishing touches. He'll add a **footer**—a repeating element that appears at the bottom of every page. If he wanted to, John could also add a **header** to repeat at the top of the page.

To add a footer

1. Choose Insert Footer from the Format menu.

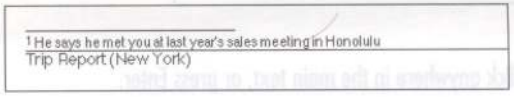
   ClarisWorks immediately creates a footer box and drops the insertion point into the box.

2. Type the contents of the footer (figure 3-16).

   John's Footer

   ```
   Trip Report (New York)
   ```

Figure 3-16
Text in a footer



3. Type a few spaces, and then choose Insert Date from the Edit menu.

   The date is added automatically to the footer. The date changes automatically when you open the document on a different day.

   If you wanted to create a header at the top of the page, you would use the Insert Header command, just as you used the Insert Footer command, in step 1.

- **Page Numbers and Times** You use the same method to insert automatic page numbers and times. If you don't want page numbers, dates, and times to be updated automatically, type the information rather than inserting it.

Checking the Spelling

The last step John takes is to check the spelling in the trip report. The spell checker checks the whole report, including the footer.

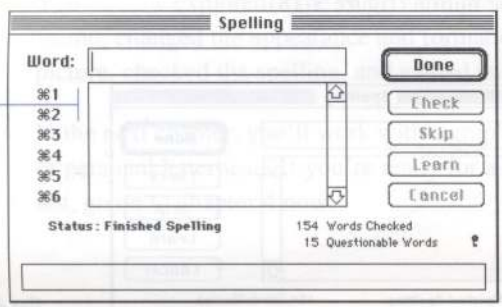
If you don't see the Spelling dialog box, you may not have installed the spelling-checker dictionaries. See chapter 1 for installation information.

To check spelling

1. **Choose Check Document from the Spelling submenu (Edit menu).**

   The Spelling dialog box (figure 3-17) opens, which shows the number of words checked so far and the first questionable word. The questionable word is selected.

Figure 3-17
Checking the spelling



TGS013-A DB Spelling Done

2. **Click the flag to switch the context box on.**

   The context box shows the words before and after a questionable word.

3. Click a suggested replacement or type the correct spelling in the Word box and click Replace.

ClarisWorks inserts the correction and continues the check. If one of the suggested replacements is correct, you can use the keyboard command shown at the left of the word.

In the example, you would press Command-1 to replace "screning" with "screening."

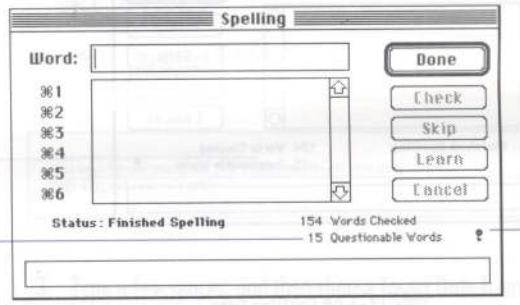
To use other options

- Click Check to search again for suggested replacements.
- Click Skip if the word is spelled the way you want it.
- Click Learn to add the term to a user dictionary.

For detailed information on dictionaries, see the *ClarisWorks Handbook* after you've finished the tutorial.

When the spelling check is complete, the dialog box changes to show a Done button (figure 3-18).

Figure 3-18
Check complete



To close the Spelling dialog box

- Click Done.

Closing the Report

You're now near the end of chapter 3 of the tutorial. In chapter 4, you'll be working with a different document, so you now need to save and close the trip report (or continue writing your own report).

To close the document

1. Click the close box.

   If you haven't saved changes since the midway point, a dialog box asks if you want to save changes.

2. Click Cancel if you want to do more work in this document.
3. Click Yes if you want to save your work, and No if you don't.

   The document closes.

Wrapping Up Chapter 3

You've now explored some basic word processing skills. You've written a memo, changed the appearance and format of text, added a footnote and a picture, checked the spelling, and named and saved a document.

In the next chapter, you'll work with a graphics document to create a business or personal letterhead. If you're ready for a break, this is a good spot for it. If not, go on to chapter 4 now.

Chapter 4

Creating a Letterhead

Starting the Letterhead	4-2	Scaling the Art	4-14
Setting Up the Rulers	4-3	Adding More Text	4-15
Starting the Artwork	4-5	Moving Objects Freely	4-16
Changing Pen Width and Color	4-6	Aligning Objects Precisely	4-16
Saving as You Work	4-7	Working in a Different View	4-16
Adding the Company Name	4-8	Grouping All the Objects	4-17
Changing the Look of the Name	4-9	Using the Letterhead for Stationery	4-18
Adding the Company Logo	4-12	Wrapping Up Chapter 4	4-20

Chapter 4

Creating a Letterhead

This chapter of the tutorial introduces you to ClarisWorks graphics documents.

In this chapter you'll learn how to

- work with ClarisWorks graphics tools and rulers
- add color and pattern to objects you create
- create or import pictures
- transfer the letterhead design to a text document and save the document as stationery

Starting the Letterhead

Margo Real is responsible for corporate communications at Pegasus Books International. She is preparing a mailing to franchise managers and wants to design special letterhead stationery for the job. She'll then pass along a copy of the stationery to the managers for use in their own local mailings.

Follow along now as Margo develops the new letterhead. As you work through the tutorial, you can start work on your own graphics document or use the examples and sample art provided for the tutorial.

To start the letterhead

- **Open a new graphics document (see chapter 2 for details on opening a new document).**

  In the title bar of the new document (figure 4-1), you see the name "Untitled 1 (GR)." The *GR* stands for graphics. You can rename the document when you save it.

  The document looks like the sample you opened in chapter 2, except this one contains no pre-drawn objects in the drawing area. Notice the dotted lines that crisscross the document. These are the graphics **gridlines.** You use them to align and size objects as you draw. Gridlines don't print.

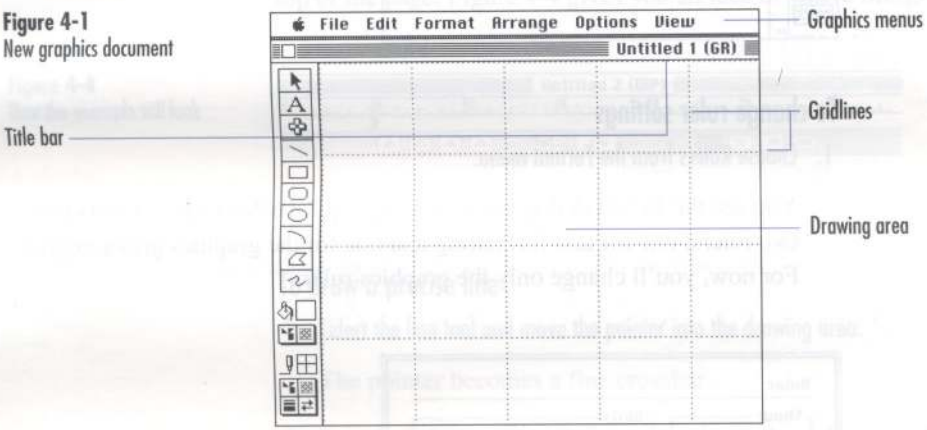


Figure 4-1
New graphics document

Setting Up the Rulers

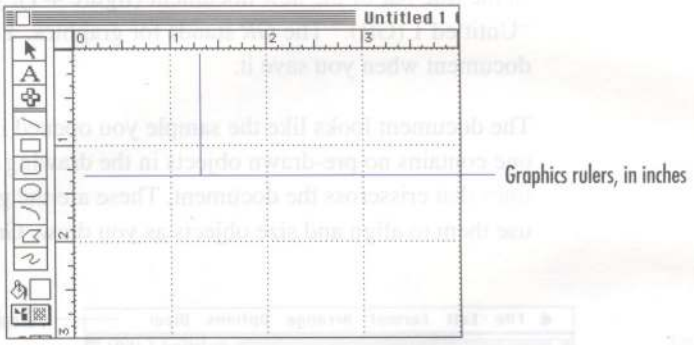
Margo's letterhead will be used in countries where the metric system is standard, so she decides to change the unit of measure for the ruler, and thereby change the spacing of the gridlines, to centimeters.

To show the graphics rulers

- **Choose Show Rulers from the View menu.**

  At the top and left side of the document you now see the **graphics rulers** (figure 4-2). The rulers are preset to measure in inches, and the gridlines are spaced in intervals of 1 inch.

Figure 4-2
Graphics rulers

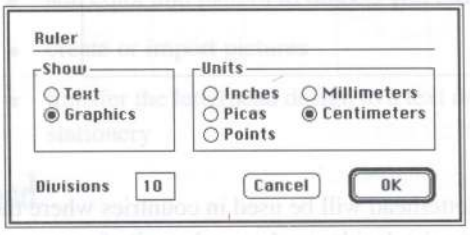


To change ruler settings

1. **Choose Rulers from the Format menu.**

   You see the Rulers dialog box (figure 4-3). ClarisWorks documents use two rulers: one for text formatting and one for the graphics grid/autogrid. For now, you'll change only the graphics ruler.

Figure 4-3
Changing ruler settings



2. Click Graphics.
3. Under Units, click Centimeters.
4. Type "10."

   The ruler is preset for eight **divisions** per inch. Since the metric system uses ten divisions, you'll need to revise the number of divisions. This change affects the invisible grid/autogrid, which you'll learn about later.

5. Click OK.

   The rulers now measure in centimeters, and the gridlines correspond to the new unit of measure.

Starting the Artwork

Margo starts the artwork with a horizontal line to set off the letterhead on the top of the page. Figure 4-4 gives you an idea of where Margo is headed.

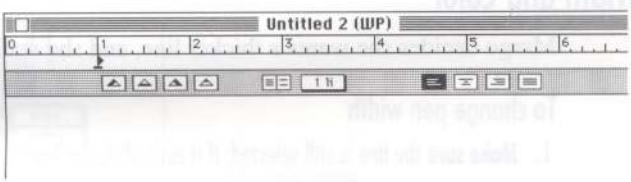


Figure 4-4
How the example will look

To draw a precise line

1. Select the line tool and move the pointer into the drawing area.

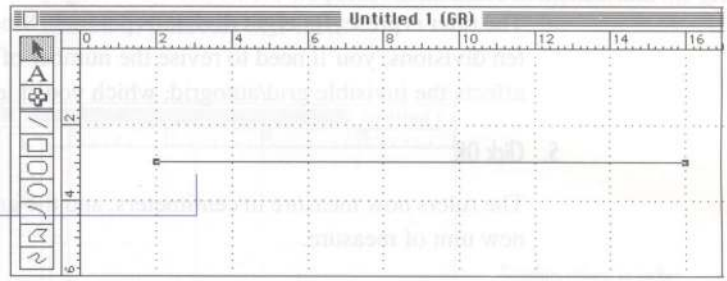
   The pointer becomes a fine crossbar.

2. Press the Shift key and hold it down as you drag to draw a line across the page.

   Holding down the Shift key keeps the line horizontal, vertical, or at a 45-degree angle.

To make your work look like Margo's example (figure 4-5), start the line at a point 3 centimeters down from the top margin of the page and 2 centimeters from the left. End the line at 16 centimeters.

Figure 4-5
First line



When you finish the line, you see handles at each end, indicating that the line is selected.

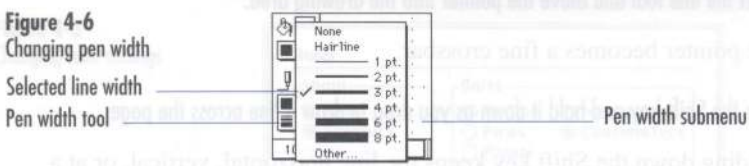
Changing Pen Width and Color

Margo decides she wants a thicker line, and she wants to make the line red.

To change pen width

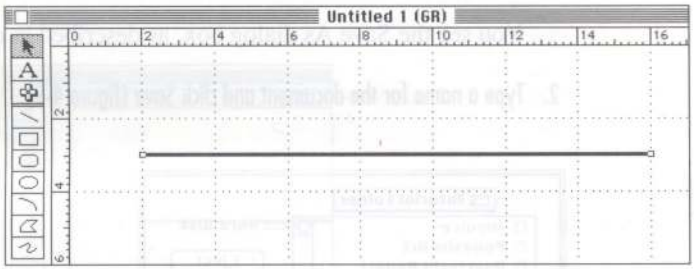
1. Make sure the line is still selected; if it isn't, click the line to make the handles appear.
2. Choose a different width from the pen width submenu (figure 4-6).

Figure 4-6
Changing pen width



As soon as you release the mouse button, the line widens (figure 4-7).

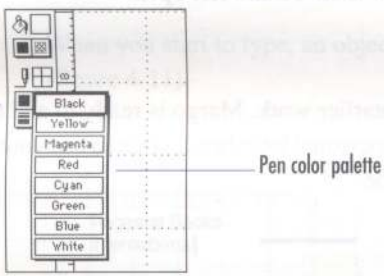
Figure 4-7
Wider line



You use the same method to change the pen width for any other object you draw.

3. **While the line is still selected, choose red (or a different color) from the pen color submenu (figure 4-8).**

Figure 4-8
Changing pen color



- **About Color** Your color palette may look different from the one shown. On a grayscale monitor, colors appear as shades of gray, and the palette may look different. On a black-and-white monitor, colors are listed by name in the palette. You won't see any change if you choose a color.

Saving as You Work

It's always a good idea to save a document as you go along. If you have an unexpected occurrence or a power failure, you won't lose your work.

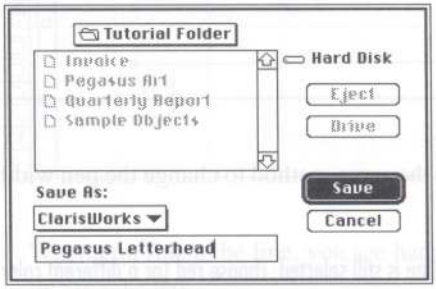
To save the letterhead

1. **Choose Save from the File menu.**

   You see the Save As dialog box, as described in chapter 3.

2. **Type a name for the document and click Save (figure 4-9).**

Figure 4-9
Saving as you work



The document is saved and left open.

Adding the Company Name

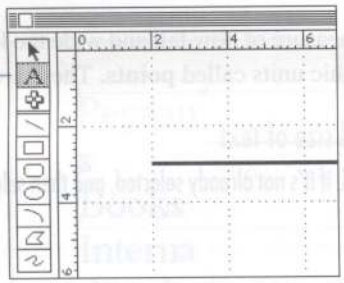
After saving her earlier work, Margo is ready to add the company name. If you're creating a personal letterhead, you can use your name where Margo puts the company name.

To add text

1. Select the text tool (figure 4-10).

Figure 4-10
Adding text

Text tool



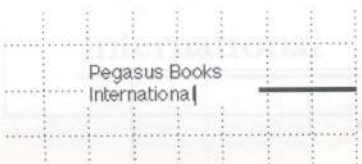
2. Click in the document and then type the name you want to use.

   Margo types

   ```
   Pegasus Books International
   ```

   When you start to type, an object is created to hold the text (figure 4-11).

Figure 4-11
Text in the drawing



The Pegasus line is long, so the last word wraps onto a new line. You'll reshape the object after you change the font and font size.

Changing the Look of the Name

The company name looks too small for this part of the letterhead, so Margo decides to change the way the name looks. She'll change the font, size, and style of the type.

A **font** is a set of letters, numbers, and symbols with a particular appearance. The preset font is Helvetica, which is what you see in figure 4-11. A **style** modifies the basic appearance of the characters in a font. For example, a font can be styled as italic (slanting), bold (darker), or outline.

The **size** is simply a measure of how tall and wide the letters are. Font sizes are measured in typographic units called **points.** There are 72 points in an inch.

To change the font and size of text

1. Select the graphics tool, if it's not already selected, and then select the object that contains the text (figure 4-12).

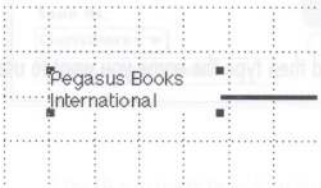


Figure 4-12
Selected object

2. Choose a new font and size from the Format menu.

   Margo chooses Times for the font and 36 points for the size. Figure 4-13 shows the results.

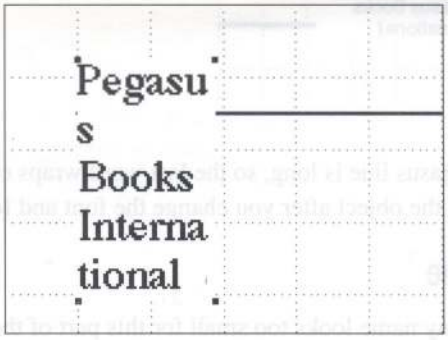
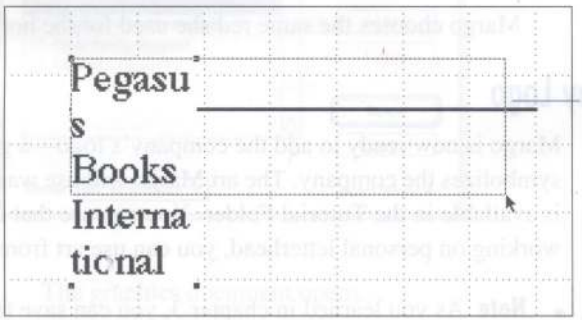


Figure 4-13
Name after font and size change

To change the shape of the object so the text fits correctly

1. Select the graphics tool and the object, if necessary.
2. Drag a handle to change the size and shape (figure 4-14).

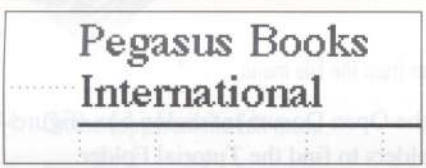
Figure 4-14
Changing the shape of the object



When you release the mouse button, you see the object in its new shape (figure 4-15).

3. Move the object above the line you drew.

Figure 4-15
Reshaped object



To change the color of the selected text

1. Select the object that contains the text, and choose Text Color from the Format menu, but don't release the mouse button.

   You see a color palette attached to the Text Color command. The palette is similar to the one you use to change pen color, but this palette is attached to a menu instead of being part of the tool palette.

2. **Drag to choose a color from the palette, releasing the mouse button when the color you want is selected.**

   On a grayscale monitor, you can choose a shade of gray, if you wish. On a black-and-white monitor, you can choose a color by name.

   Margo chooses the same red she used for the horizontal line.

Adding the Company Logo

Margo is now ready to add the company's logo—a graphic design that symbolizes the company. The art Margo will use was created in MacPaint and is available in the Tutorial Folder. You can use that art if you wish. If you're working on personal letterhead, you can use art from another source.

- **Note** As you learned in chapter 3, you can save time by using the Insert command instead of copying and pasting. Art from other sources should be saved in a format like PICT if you want to insert it in a ClarisWorks document.

In chapter 3, you learned to copy and paste text. Copying and pasting graphics works the same way.

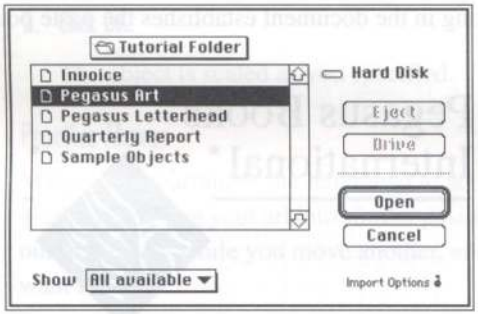
To add art

1. **Choose Open from the File menu.**

   You see the Open Document dialog box (figure 4-16). You may need to change folders to find the Tutorial Folder.

2. Double-click the Pegasus Art document name.

Figure 4-16
Opening the existing art document



The graphics document opens.

3. Click the logo art to select it (figure 4-17).

Figure 4-17
Selected art

4. Choose Copy from the Edit menu.
5. Close the Pegasus Art document.

6. **Click in the letterhead document, and then choose Paste from the Edit menu.**

   ClarisWorks pastes the art and leaves the object selected (figure 4-18). Clicking in the document establishes the paste point.

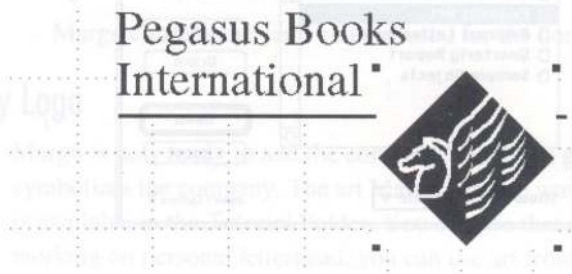


Figure 4-18
Letterhead with logo just added

Scaling the Art

The art is too big for the letterhead, so Margo decides to rescale the picture. She could simply resize the object by dragging the handles, but she wants to get a more accurate reduction. Changing the size by dragging distorts pictures like the one in the Pegasus Art document, though it's fine for simple graphics like rectangles and ovals. Using Scale Selection resizes an object in exact proportions.

To rescale the art proportionally

1. **While the object is still selected, choose Scale Selection from the Options menu.**

   You see the Scale Selection dialog box (figure 4-19). The percentage of scaling is preset at 50% for both vertical and horizontal dimensions.

2. **Type a percentage.**

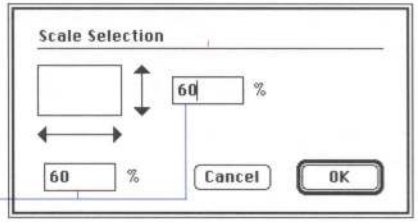


Figure 4-19
Scaling a selected object

Identical percentages scale both dimensions proportionally

Percentages below 100 reduce the object, and percentages above 100 enlarge it.

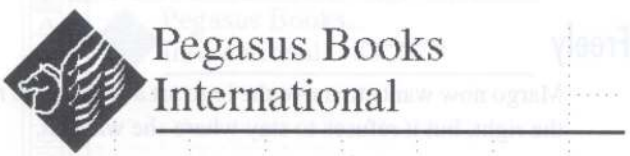
3. Click OK.

   The object is scaled as you specified.

Practice Moves

Margo now rearranges the letterhead to achieve the effect shown in figure 4-20. Try moving your art into similar positions. You can drag a selected object out of the way while you move another, and then place the object where you want it.

Figure 4-20
After rearranging the objects



Adding More Text

Now Margo is ready to add the address lines to the letterhead. She wants to be able to move the address lines around as she designs, so she creates new text in a new, independent object.

To add more text

1. Select the text tool and click anywhere in the top portion of the page.

   If you click inside the existing text, you'll see the insertion point blinking next to the text enclosed in a box. In this step, though, you want to create a new object for the address text. Try again, clicking outside any existing text. You should see a new box and the blinking insertion indicator.

2. Type the address lines.

   Margo types

```
22436 Sudcliffe Lane
London E1 9LD
```

When you've finished the new text, select the graphics tool and object, just as you did earlier, and move the text into place in the letterhead. You may also need to drag a handle, as you did earlier, to stretch the text over two lines.

Figure 4-21 shows Margo's letterhead, now nearly complete.

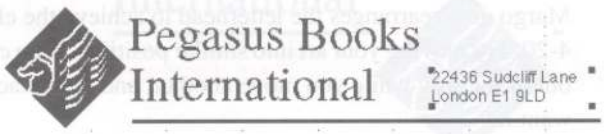


Figure 4-21
More text in the letterhead

Moving Objects Freely

Margo now wants to move the logo art a little to the right. She drags it toward the right, but it refuses to stay where she wants it.

What's holding the object is the graphics **autogrid,** which automatically "attracts" objects and keeps them with the grid. For precise work, you may often wish to work with the autogrid off.

To turn off the autogrid

- Choose Turn Autogrid Off from the Options menu.

  Now when you move an object it no longer snaps into place along the invisible gridlines. You can move things exactly where you want them.

Working in a Different View

Sometimes when you work with graphics documents you need to get an overview of the whole document. You can do that by zooming out from the picture.

To reduce the view

- Click the zoom out control (figure 4-24).

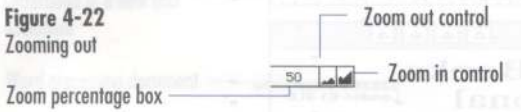


Figure 4-22
Zooming out

As you learned in chapter 2, the view is reduced each time you click the zoom out control (figure 4-25).

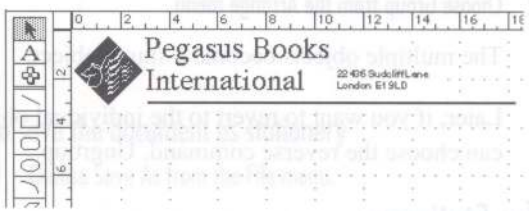


Figure 4-23
Letterhead at 50%

For the reverse effect—enlargement, for working with details—you use the zoom in control.

Practice Moves

Try moving a few objects around and then switching back to a 100% (full-size) view. You can see that anything you move in the reduced view stays in the new location in the full-size view.

Grouping All the Objects

You're almost ready to move the letterhead to a text document, where you'll save the text document as ClarisWorks stationery for use later. You can move the letterhead as one piece of art by grouping all its elements into a single object.

To group objects

1. Choose Select All from the Edit menu.

   Handles appear on all the objects you've created (figure 4-26).

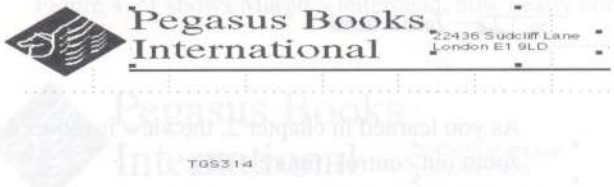


Figure 4-24
All selected

2. Choose Group from the Arrange menu.

   The multiple objects become a single object.

   Later, if you want to revert to the individual objects to make changes, you can choose the reverse command, Ungroup.

Using the Letterhead for Stationery

Margo is now ready to move the letterhead into a text document and save the document as stationery. Stationery can be used again and again as a basis for new documents.

To move the letterhead

1. If necessary, select the grouped object.
2. Choose Copy from the Edit menu.

   A copy of the letterhead is placed on the Clipboard.

3. Open a new word processing document (for a review, see chapter 2).

   When the document opens, you see the text insertion point blinking at the top left.

4. Choose Paste from the Edit menu.

   The object is pasted at the location of the insertion point. You see the insertion point blinking at the right side of the art.

5. Press Return to move the insertion point down one line (figure 4-27).

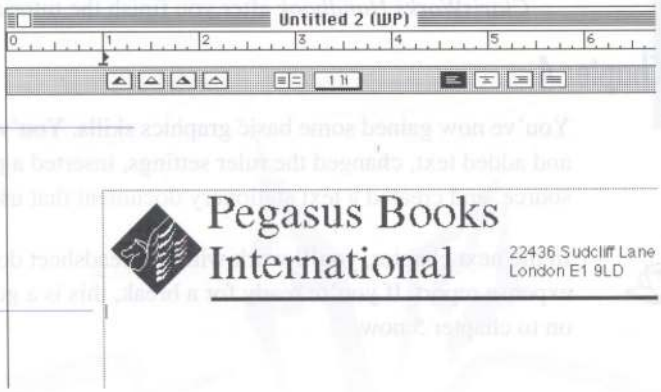


Figure 4-25
Letterhead in a new text document

To save the document as stationery

1. Choose Save As from the File menu.

   You see the Save As dialog box (figure 4-28).

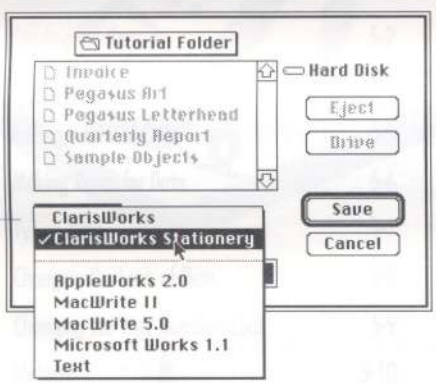


Figure 4-26
Saving stationery

2. Choose ClarisWorks Stationery from the Save As pop-up menu.
3. Name the stationery and click Save.

   Margo names her stationery "Pegasus Stationery."

The text document with letterhead is now ready to use for memos and letters. For information on using stationery documents, see the *ClarisWorks Handbook* after you finish the tutorial.

Wrapping Up Chapter 4

You've now gained some basic graphics skills. You've drawn graphic objects and added text, changed the ruler settings, inserted a picture from another source, and created a text stationery document that uses the letterhead.

In the next chapter, you'll work with a spreadsheet document to create an expense report. If you're ready for a break, this is a good spot for it. If not, go on to chapter 5 now.

Chapter 5

Tracking the Numbers

Starting the Report	5-2	Filling in Formulas	5-15
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Changing the Look of Data	5-8	Creating a Chart	5-20
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Chapter 5

Tracking the Numbers

This chapter of the tutorial introduces you to ClarisWorks spreadsheet documents, using a financial report as the example.

In this chapter you'll learn how to

- set up a spreadsheet
- enter data and formulas
- change the way data looks
- transform numbers into charts

Starting the Report

Travis McLellan manages the Pegasus Books International accounting office and is about to set up a quarterly report in ClarisWorks.

Travis chooses a spreadsheet document for the report because he wants to do some calculations and then convert the numbers into a chart.

As in other tutorial chapters, you can use Travis's information or start work on your own project as you learn.

To start the report

- **Open a new spreadsheet document (if you need a refresher, see chapter 2).**

  In the title bar of the new document, you see the name "Untitled 1 (SS)." The *SS* stands for spreadsheet. You can rename the document when you save it.

  You immediately see that a grid of columns and rows is already set up (figure 5-1). A new spreadsheet document is like a blank columnar pad—the type of pad used by accountants and scorekeepers.

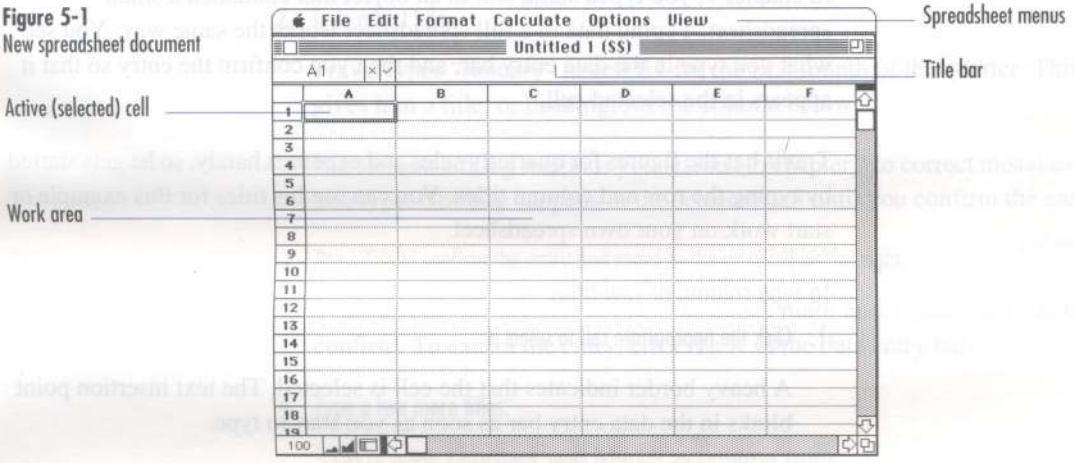

File Edit Format Calculate Options View
Spreadsheet menus
Untitled 1 (SS)
Title bar
A1
Active (selected) cell
Work area
A B C D E F
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19
100

Figure 5-1
New spreadsheet document

Understanding Data Entry

The boxes formed where columns intersect rows are **cells**—the working elements in a spreadsheet where you enter numbers (data) and formulas. You can also use cells for text (another type of data).

Figures 5-1 and 5-2 show a selected cell, surrounded by a heavy border. A cell must be selected before you can type data, but you don't type directly in the cell. Instead, you use the data entry bar.

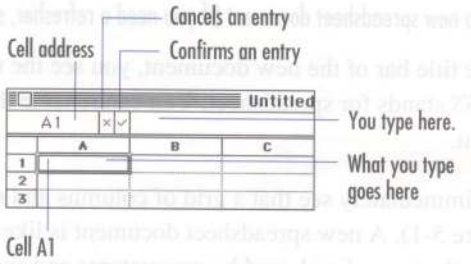


Figure 5-2
Elements of the data entry bar

In chapter 2, you typed some text in an object that contained a small spreadsheet. Typing data in a full spreadsheet works the same way. You see what you type in the data entry bar, and then you confirm the entry so that it appears in the selected cell.

Travis has the figures for quarterly sales and expenses handy, so he gets started by typing the row and column titles. You can use his titles for this example or start work on your own spreadsheet.

To type column or row titles

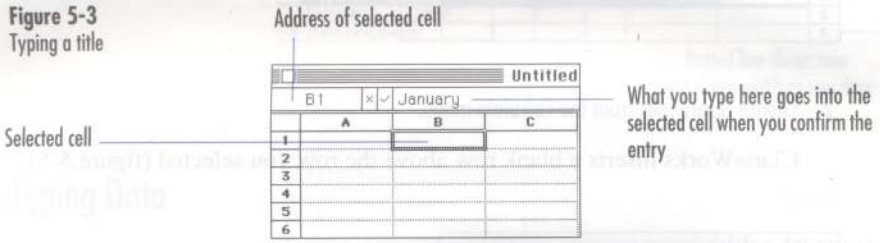
1. **Click the appropriate cell to select it.**

   A heavy border indicates that the cell is selected. The text insertion point blinks in the data entry bar as soon as you start to type.

   Travis selects cell B1.

Notice that the address box shows the column and row designation of the selected cell (figure 5-3). Columns are identified by letters, and rows by numbers. The combination of column letter and row number is the **cell address.**

Figure 5-3
Typing a title



2. **Type a text title.**

   Travis types "January" in cell B1 for the first month of the quarter. This gives him a title, or heading, for the column below.

   Use the text editing methods you learned in chapter 3 to correct mistakes as you type. Nothing happens in the selected cell until you confirm the entry.

3. **Press Tab to confirm the entry and move to the next cell on the right.**

   You can also press Enter or click the check mark in the data entry bar to confirm. To cancel the entry, click the X in the data entry bar.

4. **Type a few more titles.**

   Travis adds February and March as column titles.

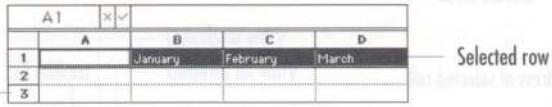
Adding a Row of Cells

After typing the months, Travis realizes that he's forgotten to put in a title for the report, so he decides to add a row of cells.

To insert a row of cells

1. Select a row of cells by clicking the row number (figure 5-4).

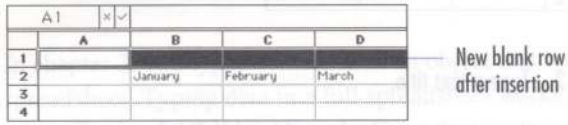
Figure 5-4
Selecting a row



2. Choose Insert Cells from the Calculate menu.

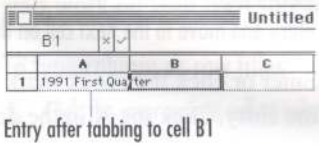
ClarisWorks inserts a blank row above the row you selected (figure 5-5).

Figure 5-5
After inserting a row



Travis adds the title for the report, "1991 First Quarter" in cell A1, and tabs into cell B1 (figure 5-6).

Figure 5-6
Adding a title



Making Room for Data

Travis sees that the new title is too wide for the cell (figure 5-6), so he decides to enlarge column A to make room for the words.

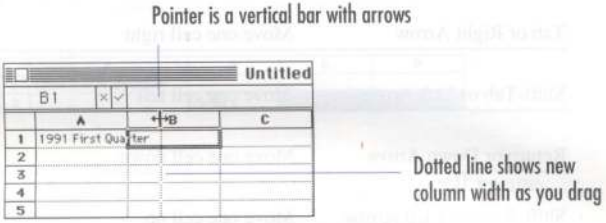
To widen a column

1. Move the pointer into the column header, and place it over the line between the columns.

The pointer becomes a vertical bar with arrows at each side.

2. Drag the column border to the right until the column is the width you want (figure 5-7).

Figure 5-7
Widening a column



Typing Data

Travis is now ready to fill in some numbers for expenses. The numbers he uses are shown in figure 5-8 (you can use your own if you're building your own report).

Figure 5-8
Sample data

	A	B	C	D
1	1991 First Quarter			
2		January	February	March
3				
4	Cost of Goods Sold	129252	166566	169920
5	Selling & Administrative Costs	34467	44091	37382
6	Shipping	8616	12247	10200
7	Depreciation	2245	2350	2148
8	Interest Expense	5600	6360	2458

When you finish entering data, you can resize columns to make room for whatever you type.

To type data

- Select a cell and follow the same process you used with text, this time entering numbers.

To use keyboard shortcuts

Press	To
Tab or Right Arrow	Move one cell right
Shift-Tab or Left Arrow	Move one cell left
Return or Down Arrow	Move one cell down
Shift-Return or Up Arrow	Move one cell up

Changing the Look of Data

After typing the set of entries. Travis decides to improve the way the spreadsheet looks by making the title bold and by adding currency signs to the numbers.

To change the font, style, or size of text or numbers

1. **Select the cells whose contents you want to change.**

   Travis selects cell A1.

2. **Choose the font, style, or size you want from the Font, Size, and Style submenus on the Format menu.**

   Travis chooses Bold from the Style submenu (figure 5-9), but doesn't change the font or size.

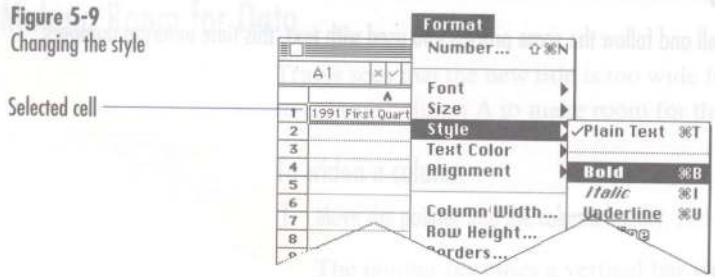
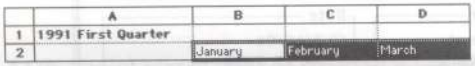


Figure 5-9
Changing the style

To change numerous cells at once

1. Drag across a row or down a column to select several cells (figure 5-10).

Figure 5-10
Selecting a range of cells



A group of selected cells make up a **cell range.**

2. Change the font, style, or size as if you had selected a single cell.

Changing the Way Numbers Look

Travis now turns to the numbers to make changes. These are financial figures, so he wants to show currency signs.

To change the way numbers look

1. Select a cell or range of cells you want to change (figure 5-11).

Figure 5-11
Selecting a range of numbers

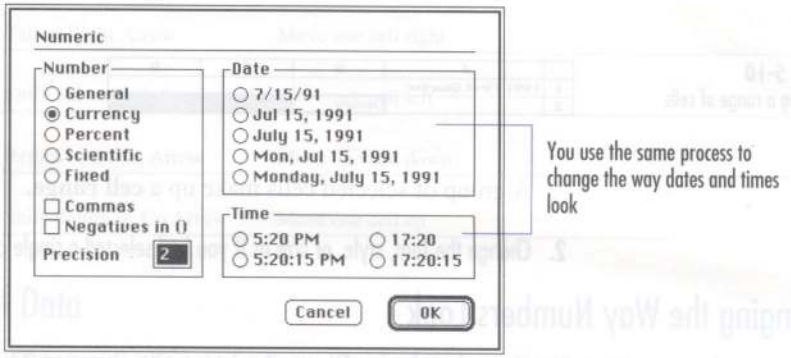
Cost of Goods Sold 129252 166566 169920
Selling & Administrative Costs 34467 44091 37382
Shipping 8616 12247 10200
Depreciation 2245 2350 2148
Interest Expense 5600 6360 2458

2. Choose Number from the Format menu.

You see the Numeric dialog box (figure 5-12).

3. Click Currency and type 0 for Precision.

Figure 5-12
Changing number format



If you want to use decimal places, either leave the Precision box at 2 (preset) or type the number of decimal places you want.

4. Click OK.

ClarisWorks now shows the numbers with currency signs (figure 5-13). There are no decimal places because the precision was set at 0.

Figure 5-13
Financial figures

Cost of Goods Sold	$129252	$166566	$169920
Selling & Administrative Costs	$34467	$44091	$37382
Shipping	$8616	$12247	$10200
Depreciation	$2245	$2350	$2148
Interest Expense	$5600	$6360	$2458

Midway

You're now about midway through this session of the tutorial. Your report should look something like figure 5-14.

Figure 5-14
Travis' Report

Quarterly Report (SS)

A19

	A	B	C	D
1	1991 First Quarter			
2		January	February	March
3				
4	Cost of Goods Sold	$129252	$166566	$169920
5	Selling & Administrative Costs	$34467	$44091	$37382
6	Shipping	$8616	$12247	$10200
7	Depreciation	$2245	$2350	$2148
8	Interest Expense	$5600	$6360	$2458

Take a moment now to name and save the spreadsheet document. Travis used "Quarterly Report" for the name. (If you need to refresh your memory on how to save a document, see chapter 3.)

Using a Formula

At this point you may be wondering when Travis (and this tutorial) will get to "real" spreadsheet work, such as adding formulas and doing calculations. Actually, much of spreadsheet work is exactly what you've been doing: gathering data into categories, entering it in cells, and making it look good for the report.

Now Travis is ready to do some addition. In row 9 of the spreadsheet, he wants to show a total of all the expenses in the B, C, and D columns. To do this, he types a formula that instructs ClarisWorks to add the amounts in the columns.

To do simple addition

1. **Type a title for a new row.**

   Travis selects cell A9 and types "TOTAL EXPENSES."

2. **Select the cell where you want the formula, and its result, to go.**

   Travis selects cell B9, at the bottom of the first column of numbers.

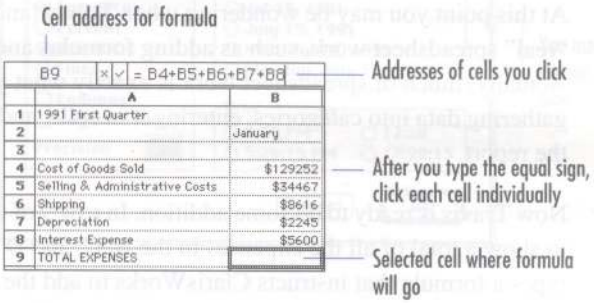
3. **Type an equal sign (=) in the entry bar.**

   The equal sign signals ClarisWorks that a formula will follow.

4. **Click each cell in the column (figure 5-15).**

   Travis clicks on cells B4 through B8.

As you click, ClarisWorks automatically enters the address of the cell you click and adds a plus (+) sign. You could click cells in other columns—anywhere in the spreadsheet—if you wanted to include them in the same formula.


Cell address for formula
B9
= B4+B5+B6+B7+B8
Addresses of cells you click
After you type the equal sign, click each cell individually
Selected cell where formula will go

	A	B
1	1991 First Quarter	
2		January
3		
4	Cost of Goods Sold	$129252
5	Selling & Administrative Costs	$34467
6	Shipping	$8616
7	Depreciation	$2245
8	Interest Expense	$5600
9	TOTAL EXPENSES	

Figure 5-15
Adding a column of numbers

5. **Press Tab to confirm the formula.**

   ClarisWorks adds the numbers and shows the result in the selected cell.

- **Note** A formula can simply refer to another cell address. For example, if you wanted the data in cell B2 to be placed automatically in cell B9, you could type "= B2."

Doing the Same Addition Faster

Travis decides that clicking cell by cell is a clumsy way to add a straight column of numbers. He decides to replace the addition formula with another one that uses a simple spreadsheet function.

A **function** is a prewritten formula you can use to do many different kinds of financial, mathematical, and scientific calculations. Many people think functions are somehow mysterious, or too complex to use, but the concept is straightforward: ClarisWorks supplies the built-in formula, and you supply the values.

Travis replaces the formula in cell B9 using the following steps. Try working through the example to see how easy it is to use a spreadsheet function.

To insert a spreadsheet function into a formula

1. **Select the cell where you want the formula, and its result, to go.**

   Travis again selects cell B9, at the bottom of the first column of numbers.

2. **Type an equal sign (=) in the entry bar.**

   You don't have to backspace to erase the old formula if the new formula will replace the whole entry.

3. **Choose Paste Function from the Edit menu.**

   You see the Paste Function dialog box (figure 5-16).

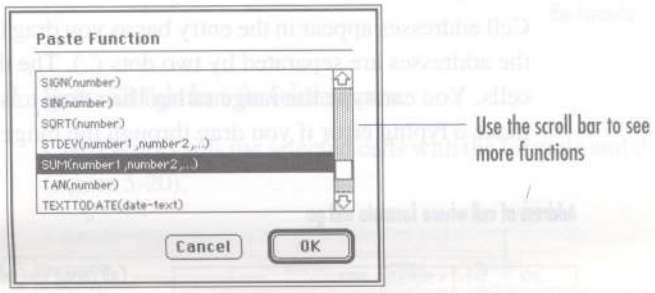


Figure 5-16
Selecting a function for a formula

4. **For this example, scroll down to the S's, choose SUM (number1, number2,...), and click OK.**

   You see the function in the data entry bar.

   The SUM function does exactly what it says it does: It adds, or sums, numbers you supply. In parentheses, ClarisWorks indicates that SUM needs values to act on. In this case, the values will be the range of numbers you want to add up. Values you supply for a function are known as **arguments.**

5. If necessary, select everything within the parentheses, but not the parentheses themselves (figure 5-17).

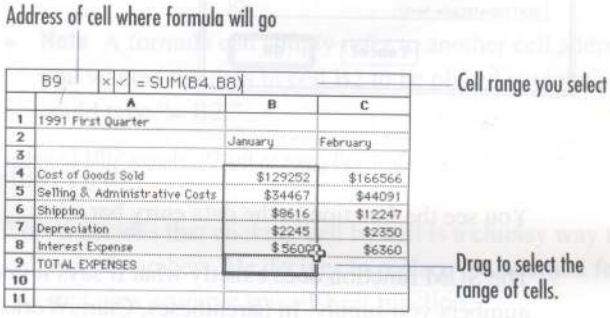
Figure 5-17
Selecting the argument

In figure 5-17, the expressions "number 1" and "number 2" are sample arguments. ClarisWorks considers a cell range as a single argument. The cell range you'll select in the next step will substitute for "number 1." The sample argument "number 2" isn't needed.

6. Drag to select the range of cells you want to add.

Cell addresses appear in the entry bar as you drag (figure 5-18). Notice that the addresses are separated by two dots (..). The dots indicate a range of cells. You can type the range rather than drag to select it, but you won't make a typing error if you drag through the range.

Figure 5-18
Dragging to select a range of cells



	A	B	C
1	1991 First Quarter		
2		January	February
3			
4	Cost of Goods Sold	$129252	$166566
5	Selling & Administrative Costs	$34467	$44091
6	Shipping	$8616	$12247
7	Depreciation	$2245	$2350
8	Interest Expense	$5600	$6360
9	TOTAL EXPENSES		
10			
11			

7. Press Tab or Enter to confirm the formula.

ClarisWorks adds the numbers and displays the result in the selected cell.

- **For More Information** For a listing of ClarisWorks functions, with examples, see the Appendix in the *ClarisWorks Handbook* or refer to the Functions Reference in the ClarisWorks Help system.

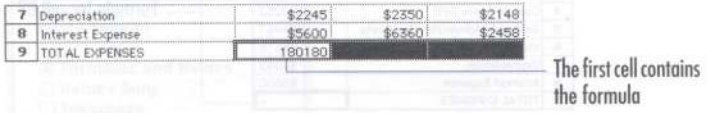
Filling in Formulas

Travis now wants to total the remaining columns the same way he did the first column. To do this, he adds the formula for the first column to the rest of the columns by using a method called **filling.**

To fill cells with a formula

1. Select the cell that contains the formula and drag to the right to select additional cells (figure 5-19).

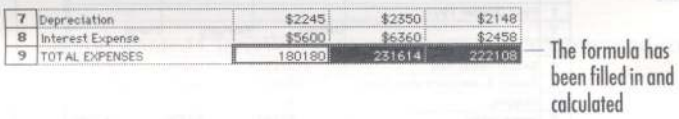
Figure 5-19
Selecting a range of cells


7 Depreciation $2245 $2350 $2148
8 Interest Expense $5600 $6360 $2458
9 TOTAL EXPENSES 180180
The first cell contains the formula

2. Choose Fill Right from the Calculate menu.

   ClarisWorks fills the selected cells with the formula and displays the results (figure 5-20).

Figure 5-20
Results of filling right


7 Depreciation $2245 $2350 $2148
8 Interest Expense $5600 $6360 $2458
9 TOTAL EXPENSES 180180 231614 222108
The formula has been filled in and calculated

   You can use the same method to fill a column downward by selecting the top cell in a column—the cell that contains a formula or a value you want to repeat—and selecting cells below it. You then choose Fill Down from the Calculate menu to fill all the cells with the same formula or value.

3. While the range is still selected, change the number format to currency, with 0 decimal precision, to match the other numbers.

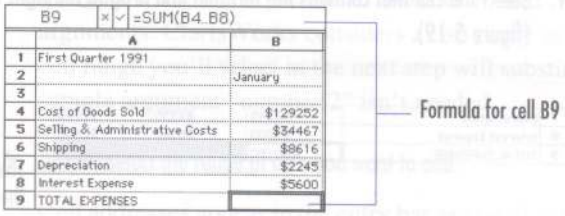
Understanding Cell References

This is a good time to take a moment to examine a formula more closely.

In "Doing the Same Thing Faster," you learned to use a function in a formula. Then, in "Filling in Formulas," you learned to fill a formula into different cells.

The formula from cell B9 worked when you filled cells C9 and D9 with it. ClarisWorks automatically changes cell addresses when you paste or fill a formula into another cell (figure 5-21).

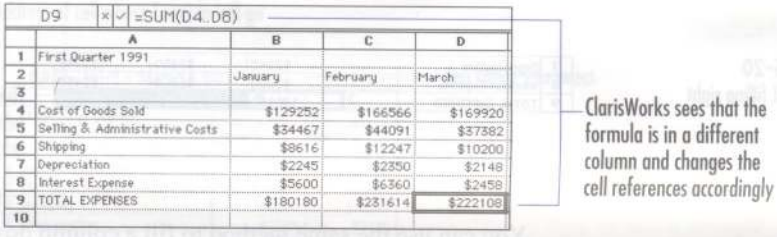
Figure 5-21
Formula and its cell references



	A	B
1	First Quarter 1991	
2		January
3		
4	Cost of Goods Sold	$129252
5	Selling & Administrative Costs	$34467
6	Shipping	$8616
7	Depreciation	$2245
8	Interest Expense	$5600
9	TOTAL EXPENSES	

These changeable cell addresses are called **relative cell references** (figure 5-22).

Figure 5-22
Same formula copied into another cell



	A	B	C	D
1	First Quarter 1991			
2		January	February	March
3				
4	Cost of Goods Sold	$129252	$166566	$169920
5	Selling & Administrative Costs	$34467	$44091	$37382
6	Shipping	$8616	$12247	$10200
7	Depreciation	$2245	$2350	$2148
8	Interest Expense	$5600	$6360	$2458
9	TOTAL EXPENSES	$180180	$231614	$222108
10				

When you really want a formula to refer to a specific cell, and you don't want ClarisWorks to supply relative cell addresses, you can use a dollar sign ($) to indicate a specific row or column: D19.

Pasting a Value or Formula

Here's a quick quiz for a change of pace.

Question When you copy a single cell that contains a formula, what do you copy? The formula or the result?

Answer Both, actually. You can select another cell and paste one or the other.

To paste a value or formula

1. **Select the cell you want to copy and choose Copy from the Edit menu.**

   ClarisWorks places a copy of both formula and result on the Clipboard.

2. **Select the cell where you want the formula or result to go.**

3. **Choose Paste Special from the Edit menu.**

   You see the Paste Special dialog box (figure 5-23).

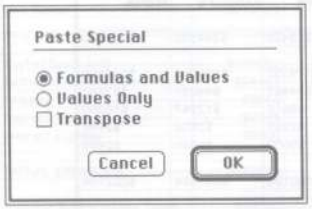


Figure 5-23
Pasting formulas and values

4. **Click the option you want and click OK.**

   ClarisWorks pastes the formula or value in the selected cell.

   If you wanted ClarisWorks to switch rows to columns and columns to rows, you could click Transpose.

Adding More Data

Travis adds a few more numbers and categories to the quarterly report, inserting the figures for net sales above the expense categories. He also changes some titles to bold, using the same methods used to change the look of text. The report now looks like figure 5-24.

Figure 5-24
Quarterly Report

Quarterly Report (SS)

A19

	A	B	C	D
1	**1991 First Quarter**			
2		**January**	**February**	**March**
3				
4	**Net Sales**	$215420	$244950	$226560
5				
6	Cost of Goods Sold	$129252	$166566	$169920
7	Selling & Administrative Costs	$34467	$44091	$37382
8	Shipping	$8616	$12247	$10200
9	Depreciation	$2245	$2350	$2148
10	Interest Expense	$5600	$6360	$2458
11				
12	**Total Expenses**	$180180	$231614	$222108
13				
14	Earnings Before Income Taxes	$35240	$13336	$4452
15	Income Taxes	$17990	$7560	$5986
16				
17	**NET EARNINGS**	$17250	$5776	-$1534
18				

You can enter the same data or continue with your own.

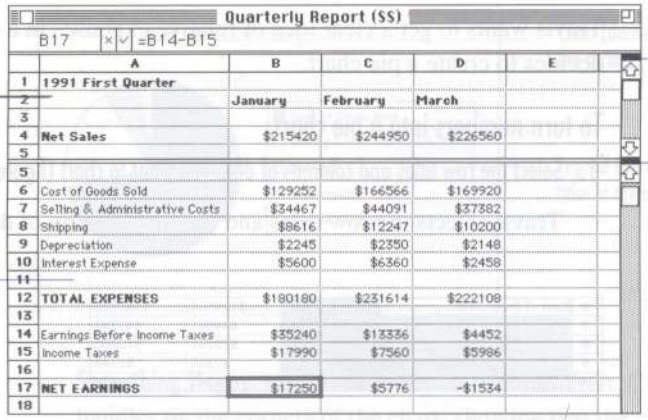
Splitting the View

As Travis moves lower in the spreadsheet, he discovers that he can't see the column titles. To bring the titles into view, he decides to split his view of the spreadsheet to make data entry easier.

To split the view of a spreadsheet

1. **Drag the horizontal split pane tool downward to keep column titles in view.**

   Travis uses the horizontal split pane tool to show the titles on the top of the spreadsheet (figure 5-25).


Quarterly Report (SS)
B17 =B14-B15
Horizontal split pane tool. . .
. . .dragged to here
Column headings show in top pane
Data lower down shows in bottom pane.

	A	B	C	D	E
1	1991 First Quarter				
2		January	February	March	
3					
4	Net Sales	$215420	$244950	$226560	
5					
5					
6	Cost of Goods Sold	$129252	$166566	$169920	
7	Selling & Administrative Costs	$34467	$44091	$37382	
8	Shipping	$8616	$12247	$10200	
9	Depreciation	$2245	$2350	$2148	
10	Interest Expense	$5600	$6360	$2458	
11					
12	TOTAL EXPENSES	$180180	$231614	$222108	
13					
14	Earnings Before Income Taxes	$35240	$13336	$4452	
15	Income Taxes	$17990	$7560	$5986	
16					
17	NET EARNINGS	$17250	$5776	-$1534	
18					

Figure 5-25
Splitting the view

2. **To enter data, click a cell in either pane.**

   Each pane contains its own scroll arrows and scroll bars, so you can move around in either view of the spreadsheet to get titles or cells where you want them.

To return to a single view

- **Drag the pane tool upward until the top pane disappears.**

Practice Moves

Look at the lower left corner of the spreadsheet window. You'll see a vertical split pane tool to the left of the scroll arrow. Try splitting the window vertically to keep the row titles visible as you scroll to the right.

Creating a Chart

With all the data in place, you're ready to create a chart. A chart gives you the ability to present a picture view of your numbers. Comprehension is easier, and you can often spot trends and relationships in a chart that you can't see in the numbers alone.

Travis wants to get a clear idea of relative expenses in a certain month, so he decides to create a pie chart.

To turn numbers into a pie chart

1. **Select the row titles and columns of data you want to chart (figure 5-26).**

   Travis selects the row titles and the first column of data (for January).

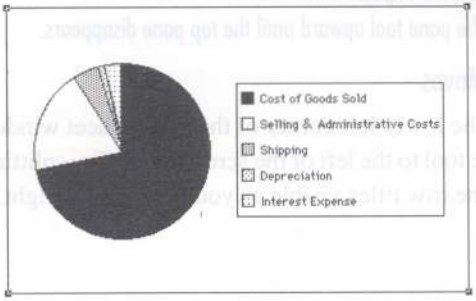
Figure 5-26
Selecting titles and data for a chart

6	Cost of Goods Sold	$129252	$166566	$169920
7	Selling & Administrative Costs	$34467	$44091	$37382
8	Shipping	$8616	$12247	$10200
9	Depreciation	$2245	$2350	$2148
10	Interest Expense	$5600	$6360	$2458

2. **Choose Make Chart from the Options menu.**

   ClarisWorks opens the Make Chart dialog box (figure 5-27). Across the top of the box you see icons that represent different types of charts: pie, bar, line, and scatter charts. ClarisWorks is preset to create a pie chart from the selected data.

Figure 5-27
Setting up for a chart



3. **Leave all the options as they are, and click OK.**

ClarisWorks draws a pie chart (figure 5-28) and places it on top of the spreadsheet. Numbers from the spreadsheet—the **data series**—make up the pie. The row titles from column A make up the **legend**—the portion of the chart that names the pieces of the pie.

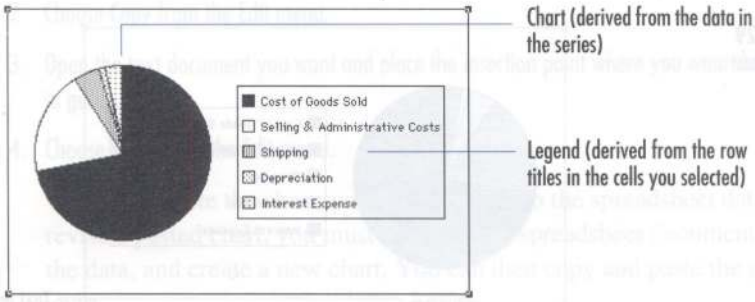


Chart (derived from the data in the series)
Cost of Goods Sold
Selling & Administrative Costs
Shipping
Depreciation
Interest Expense
Legend (derived from the row titles in the cells you selected)

Figure 5-28
A pie chart created from spreadsheet data

- **Something Happened** Take a close look at the chart. ClarisWorks has put handles on the corners of the chart, showing that the chart is selected. Now take a look at the menu bar, where you can see the Arrange and Options menus. The chart is a graphic object, so you can now change the fill color or pattern, if you wish, using the methods you learned when you worked with a graphics document (chapter 4).

Practice Moves

If you're feeling adventurous, try changing the fill pattern now. To bring the tool palette into view, choose Show Tools from the View menu.

Adding Text to the Chart

Travis realizes that by inserting the sales figures above the expenses, the month names have been separated from the data in the chart. He needs to type "January" below the pie chart.

To add text

1. **Choose Show Tools from the View menu.**

The tool palette appears on the left side of the window.

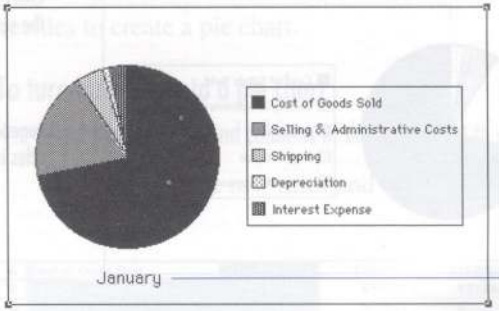
2. **Select the text tool, click somewhere in the chart, and type the text.**

   Travis types "January." ClarisWorks creates an object to hold the text.

3. **Select the graphics tool and then select the new text object.**

   You can now move the text anywhere within the chart (figure 5-29).

Figure 5-29
Text in a chart



4. **Hold down Shift as you select the text and the chart.**

5. **Choose Group from the Arrange menu.**

   You can now move or copy the grouped chart as one object.

To return to the spreadsheet

- **Click anywhere in the spreadsheet, outside the chart.**

  You may need to select and move the chart so that you can see different areas of the spreadsheet.

Copying and Pasting a Chart

Travis now wants to paste the sample chart into a text document. For purposes of the tutorial, you can follow along by pasting the chart into the text document you created in chapter 3 (a trip report or your own memo).

To copy and paste a chart

1. **If the chart is no longer selected, click it once.**

   If you chose not to group the text and chart in the previous section, select the text as well as the chart. Hold down Shift as you click the chart and then the text.

2. **Choose Copy from the Edit menu.**
3. **Open the text document you want and place the insertion point where you want the chart to go.**
4. **Choose Paste from the Edit menu.**

   When you paste the chart, you break its link to the spreadsheet data. To revise a pasted chart, you must return to the spreadsheet document, revise the data, and create a new chart. You can then copy and paste the updated chart.

Wrapping Up Chapter 5

You've now explored a ClarisWorks spreadsheet document. You've built a financial report, created a formula, changed the way the spreadsheet looks, and created a chart from the numbers.

In the next chapter, you'll work with a database document to create an invoice and mailing list. If you're ready for a break, this is a good spot for it. If not, go on to chapter 6 now.

Chapter 6

Managing Information

Starting the Invoice	6-2	Midway	6-18
Setting Up Fields	6-3	Turning the Database into a Report	6-18
Adding More Records	6-7	Understanding Layouts	6-20
Typing Data	6-8	Working in Two Views	6-21
Using a Formula	6-11	Fine-Tuning the Report	6-22
Finding Certain Records	6-12	Adding a Picture to a Layout	6-24
Sorting the Records	6-15	Wrapping Up Chapter 6	6-29

Chapter 6

Managing Information

This chapter of the tutorial introduces you to ClarisWorks database documents, using an invoice record as an example.

In this chapter you'll learn how to

- create and define database fields
- create new records and layouts
- find and sort records
- add a graphic to a report

Starting the Invoice

Mary Whittington, who manages the Pegasus Books International telephone sales office, is about to use a ClarisWorks database to set up an invoice system for telephone salespeople.

Follow along as Mary creates the new system. As in other tutorial sessions, you can use Mary's information or start work on your own project as you learn.

To start the invoice

- **Open a new database document (see chapter 2 for details on opening a new document).**

  When the document opens, you see the Define Fields dialog box (figure 6-1). Above the box, you see the name "Untitled 1 (DB)." The number may change, depending on how many documents you open during a session. The *DB* stands for database. You can rename the document when you save it. The (DB) stands for database, which is the ClarisWorks document type.

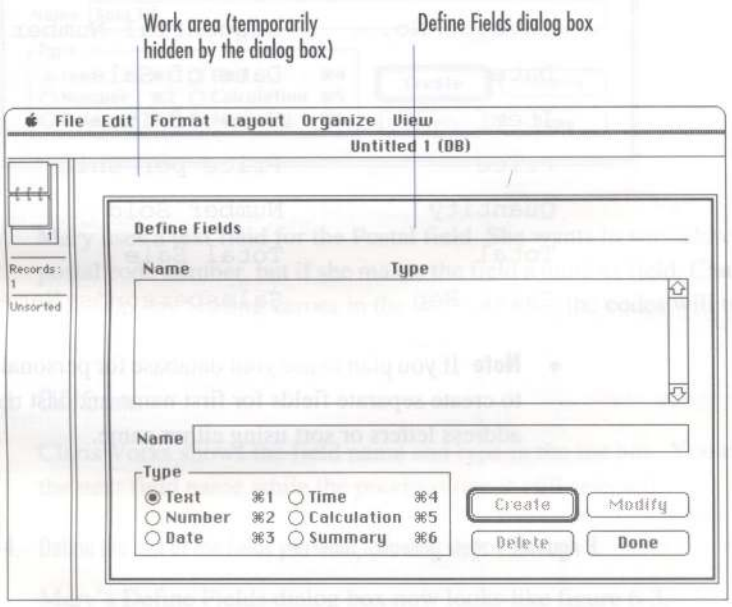


Figure 6-1
A new database document

Setting Up Fields

The information you collect in a database is stored in fields. A **field** represents a category of data. In Mary's case, fields will be the categories of information her salespeople fill in to make a sale. The process of setting up fields to hold information is called "defining a field."

You use different **field types** to hold different types of information, such as text, numbers, dates, and times. The field type determines what kind of data you can enter and what kind of work you can do with the data.

Here is a list of the fields Mary will create:

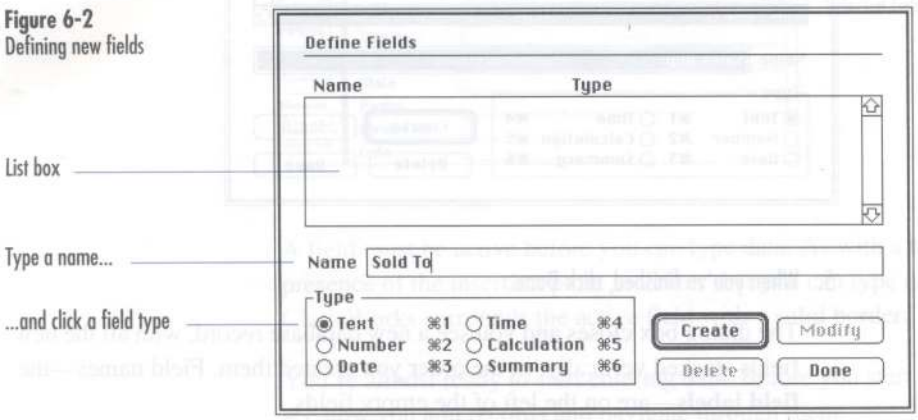
Field Name	Will Hold	Field Type
Sold To	Customer Name	Text
Street	Address	Text
City	City	Text
State	State	Text
Postal	Postal Code	Text
Invoice No.	Sequential Number	Number
Date	Date of Sale	Date
Item	Name of Item	Text
Price	Price per Unit	Number
Quantity	Number Sold	Number
Total	Total Sale	Number
Sales Rep	Salesperson's Name	Text

◆ **Note** If you plan to use your database for personalized mailings, you'll want to create separate fields for first name and last name. That way, you can address letters or sort using either name.

To define a field

1. Type a field name in the name box (figure 6-2).
2. Click a field type.

Figure 6-2
Defining new fields



Mary uses a text field for the Postal field. She wants to sort addresses by postal code number, but if she makes the field a number field, ClarisWorks will drop any leading zeroes in the code. As text, the codes will be sorted properly and retain any leading zeroes.

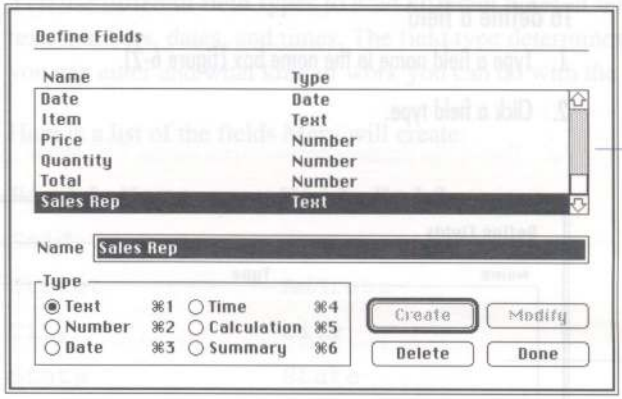
3. Click Create.

   ClarisWorks shows the field name and type in the list box. You can type the next field name while the previous one is still selected.

4. Define the rest of the fields you want, following steps 1 through 3.

   Mary's Define Fields dialog box now looks like figure 6-3.

Figure 6-3
New fields

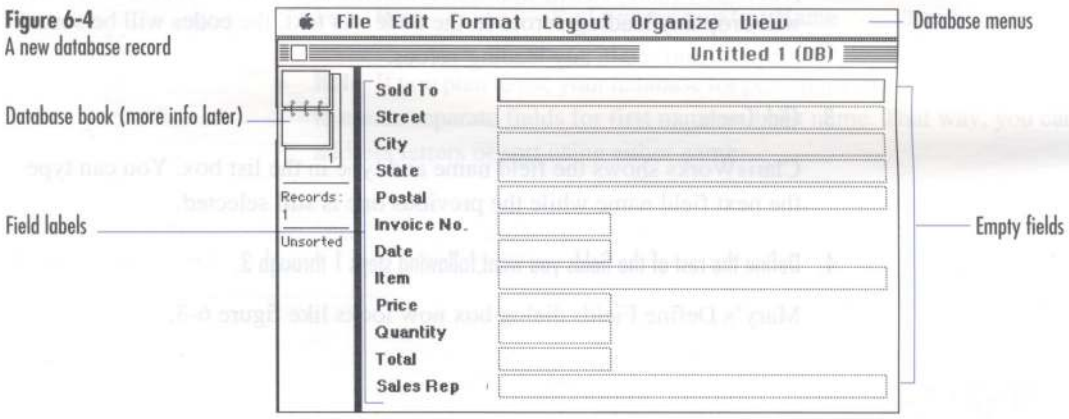


5. When you've finished, click Done.

The dialog box closes and you see a new database record, with all the new fields stacked vertically, in the order you created them. Field names—the **field labels**—are on the left of the empty fields.

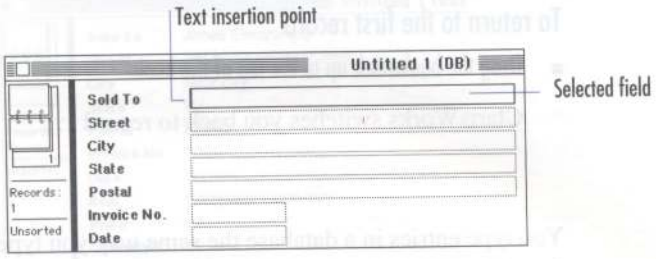
The screen should look something like figure 6-4.

Figure 6-4
A new database record



Take a closer look at the new record (figure 6-5). The topmost field is already active. You see the text insertion point blinking in the field.

Figure 6-5
Selected field



A field must be active before you can type data. As with a text paragraph, the presence of the insertion point indicates that you can type data. Also, ClarisWorks surrounds the active field with a solid border.

You're almost ready to start entering data. Before you start, take a moment to see how you add records and navigate through them.

Adding More Records

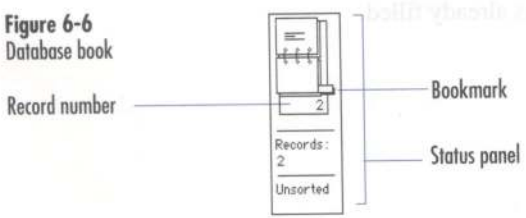
ClarisWorks automatically creates the first record in a database. After that, you can create as many records as you need up to approximately 30,000 (or as many as memory allows).

To add a new record

- **Press Command-R (or choose New Record from the Edit menu).**

  Do this now to create a new, blank record. Notice that the database book on the left now shows the number 2 (figure 6-6). The number corresponds to the active record.

Figure 6-6
Database book



You use the **database book** to move through records. The **status panel** below the book shows the sort and find status of the records (you'll learn more about those topics later in this session).

To return to the first record

- Drag the bookmark up to the top of the book.

  ClarisWorks switches you back to record 1.

Typing Data

You type entries in a database the same way you type ordinary text. After you type data in a field, you use the Tab key to move from field to field.

To activate a field

- Click anywhere in a field.

  Did the entire record become highlighted? If so, you clicked somewhere outside a field and selected the whole record, without activating the field. You must click within the dotted field borders. Click outside the record and try again.

To type data

1. Type an entry in the active field.

   Use the text editing methods you learned in chapter 3 to correct mistakes as you type.

2. Press Tab.

   The insertion point moves down to the next field.

3. Complete all the fields in the record.

   When you press Tab after the final field, the insertion point cycles back up to the first field, which is already filled.

Mary's first complete record is shown in figure 6-7.

Figure 6-7
First record, completed

To add more records

- **Keep adding records by pressing Command-R, filling them in as you go, until you have about six records.**

Figure 6-8 shows Mary's first six records. You can use the data in figure 6-8 if you're not working on a project of your own. You don't have to fill in all the fields on each record now; you can leave them blank or come back later.

Figure 6-8
Information in Mary's records

Sold To	Jones Electronics
Street	24500 Stuyvesant Blvd.
City	New City
State	NJ
Postal	55552
Invoice No.	1000
Date	9/21/91
Item	Computer Dictionary
Price	28
Quantity	10
Total	280
Sales Rep	Smythe

Sold To	Delaware Books
Street	34 Startaway Road
City	Startaway
State	AL
Postal	55555
Invoice No.	1001
Date	9/21/91
Item	Encyclopedia Globus
Price	640
Quantity	2
Total	1280
Sales Rep	Hookins

Sold To	Mary's Book Cellar
Street	5489 Old Towne Road
City	Blithetown
State	OR
Postal	55553
Invoice No.	1002
Date	9/21/91
Item	Dickens Set (paper)
Price	9.5
Quantity	6
Total	57
Sales Rep	Smythe

Sold To	Cook & Book Co.
Street	455 Shaftesbury Lane
City	East Shaftesbury
State	CT
Postal	55556
Invoice No.	1003
Date	9/21/91
Item	Salutary Salads
Price	6.5
Quantity	10
Total	65
Sales Rep	Hookins

Sold To	Titan Books
Street	4681 Oak Grove Blvd.
City	Minnetonka
State	MN
Postal	55554
Invoice No.	1004
Date	9/21/91
Item	Computer Dictionary
Price	28
Quantity	6
Total	168
Sales Rep	Smythe

Sold To	World of Books & Tapes
Street	12345 Maintown Blvd.
City	Dillon
State	CO
Postal	55557
Invoice No.	1005
Date	9/21/91
Item	Encyclopedia Globus
Price	640
Quantity	3
Total	1920
Sales Rep	Hookins

Using a Formula

Mary realizes that ClarisWorks could be doing some of her arithmetic. She has been multiplying the amount in the Price field by the number in the Quantity field to arrive at a total amount. She decides to modify the Total field and let a formula do the multiplication for her.

If you're creating your own database, try creating a new calculation field (using the steps shown in this section). If you're following the example, you'll need to modify a field definition you created earlier.

To create a calculation field

1. **Choose Define Fields from the Layout menu.**

   You see the Define Fields dialog box.

2. **If you're modifying an existing field, select the field name, click Calculation as the field type, click Modify, and then click OK in the alert.**

   If you're creating a new field, just type the new name, click Calculation as the field type and click Create.

   Mary creates a Total field.

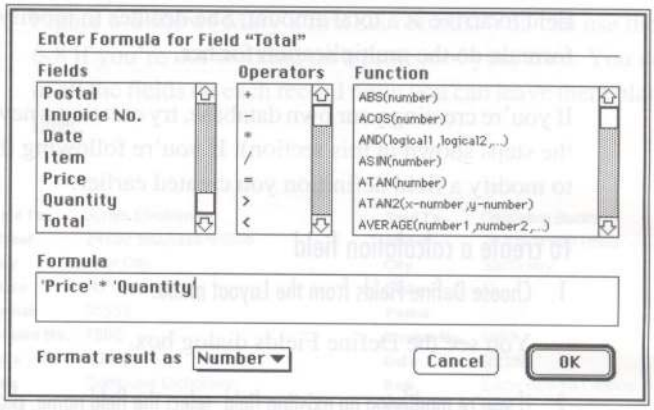
   Whether you're modifying an existing field or creating a new one, you see the Calculation dialog box (figure 6-9).

3. **Click field names and operators to enter a formula.**

   Use the scroll bar to view all the fields names. You can type the field names, but you must enclose each name in single quotes, as shown in figure 6-9, and you must be exact (clicking field names saves you from typing errors).

Mary's formula for the Total field multiples the amount in the Price field by the amount in the Quantity field.

Figure 6-9
Entering a formula



4. **Click OK to return to the Define Fields dialog box.**

   In the dialog box, you now see the formula in the list to the right of the field names.

5. **Click Done to return to the document.**

   If you modified a field, ClarisWorks replaces the hand-calculated values with the results of the formula, in all the records.

   Now, when you enter a price and quantity, ClarisWorks automatically supplies the total amount when the two entries are confirmed.

- **More Info** This part of the tutorial has given you only a brief introduction to database calculations. For details, see the *ClarisWorks Handbook.*

Finding Certain Records

Now that your database contains a few records, you're ready to explore one of the most important reasons for using a database: the ability to find information when you need it.

One of the salespeople tells Mary that a recent steady seller has been a high-priced encyclopedia. Mary wants to make sure that stores ordering this item get a sales follow-up call. She needs to find all the invoices that contain an order for the encyclopedia.

Up to now in the tutorial, you've been working in Browse, one of three ways you work with database documents. (You may not have known you were in Browse, because that's the preset option.)

In this section you'll switch to Find, which gives you a blank view called a *find request.* You use a find request to tell ClarisWorks what records you want to find.

To find records

1. **Choose Find from the Layout menu.**

   A blank record appears (figure 6-10), looking much like the data entry record with which you've been working. This blank record is a **find request.** Notice that the status panel has changed. You now see two buttons, Visible, All, and Omit.

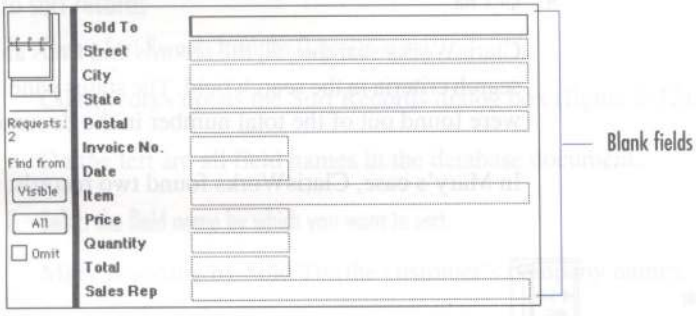


Figure 6-10
New find request

2. Activate the field where you want to search.
3. Type the characters you want to find in that field.

Mary searches the Item field to find records that contain "Encyclopedia" in that field. When she types "Encyclopedia" in the Item field (figure 6-11), the characters in "Encyclopedia" become the **search criteria**—the characters ClarisWorks uses to find records.

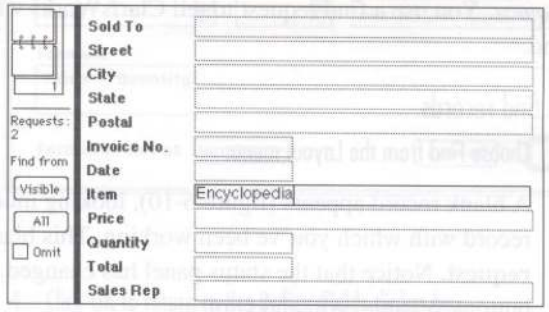


Figure 6-11
Find request with search criteria

4. Click All.

ClarisWorks searches all the records and finds any records that contain the search criteria in the search field. The status panel shows how many records were found out of the total number in the document (figure 6-12).

In Mary's case, ClarisWorks found two records.

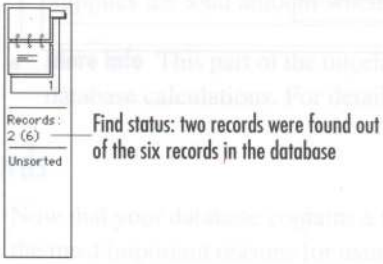


Figure 6-12
Database book after finding records

- **Renumbering** ClarisWorks renumbers the records in the **found set**. The rest of the records are temporarily omitted/hidden and are no longer visible.

To restore all the records to the set

- Choose Show All Records from the Organize menu.

  The unfound records are returned to the set.

  Do this now so that you're ready for the next section, where you'll sort the records.

  You can sort the found records if you wish, but if you're following the example, the exercise is more interesting with more records to sort.

Sorting the Records

One of the things databases do best is organize information. You've already learned to find certain records, so you're ready to take the next step: sorting.

Mary wants a complete alphabetical listing of today's customers, so, after showing all records, she sets up a sort order.

To sort records

1. Choose Sort Records from the Organize menu.

   ClarisWorks opens the Sort Records dialog box (figure 6-13).

   On the left are all field names in the database document.

2. Select the field name by which you want to sort.

   Mary is sorting by Sold To (the customer's company name).

3. Click Ascending Order (to sort A to Z) or Descending Order (to sort Z to A).
4. Click Move (or double-click the field name).

   The field name moves into the Sort Order list on the right.

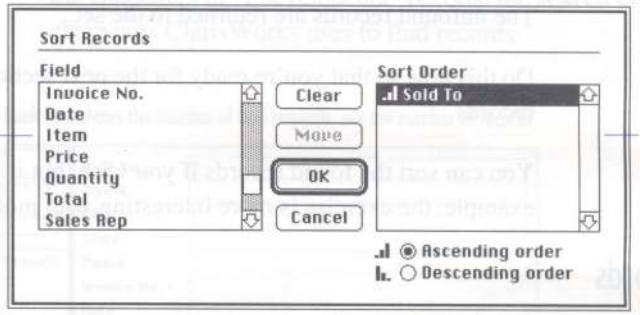


Figure 6-13
Setting up a sort order

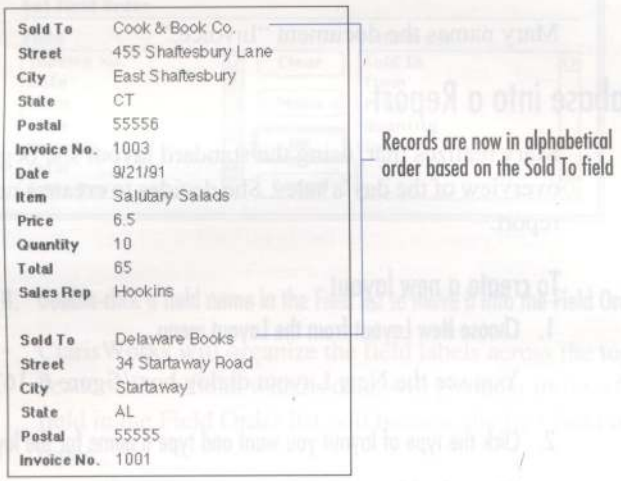
5. Repeat the process to add other sort fields.

   ClarisWorks sorts first by the top field name, then sorts records with the same entry in the first field by the second field, and so on through the list.

6. Click OK.

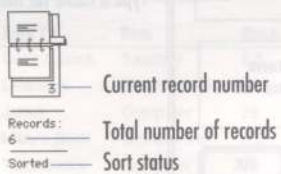
ClarisWorks sorts the records and closes the dialog box. The records are now in alphabetical order (figure 6-14).

Figure 6-14
After sorting



- **Record Numbers Change** Take a look at the status panel (figure 6-15). It shows the same number of records, but the records are now in the sorted order. What was record 6 may now be record 3, because ClarisWorks renumbers the records when you sort.

Figure 6-15
Changes in status panel



Midway

You're now about midway through this session of the tutorial. In a moment you'll begin working with layouts. This is a good time to name and save your database document. (If you need a refresher, see chapter 3.)

Mary names the document "Invoice."

Turning the Database into a Report

Mary realizes that, using the standard layout she began with, she can't get an overview of the day's sales. She decides to create a new layout for a daily sales report.

To create a new layout

1. **Choose New Layout from the Layout menu.**

   You see the New Layout dialog box (figure 6-16).

2. **Click the type of layout you want and type a name for the layout.**

   Mary decides on a columnar report and names it "Sales Report." In a columnar report, ClarisWorks organizes field labels at the top of a report, with data in the fields placed in the columns below.

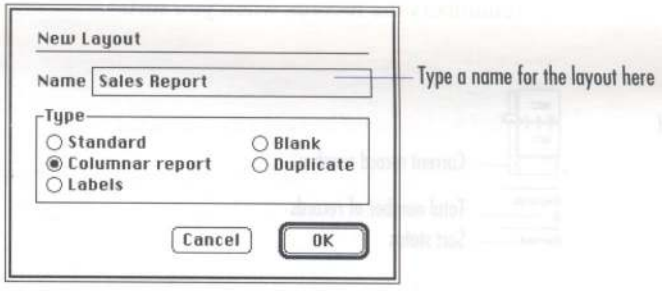


Figure 6-16
Creating a new layout

3. Click OK.

You see the Set Field Order dialog box (figure 6-17).

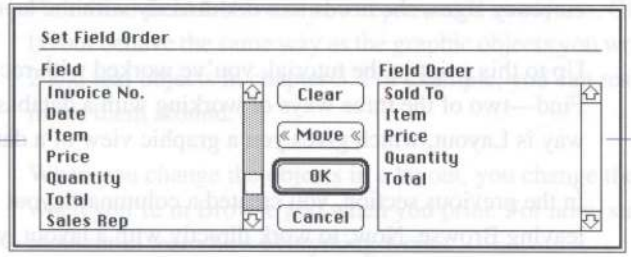


Figure 6-17
Setting the order of fields for a columnar report layout

4. Double-click a field name in the Field list to move it into the Field Order list.

ClarisWorks will organize the field labels across the top of the report as headers. Each field, with its data, will go under its own field label. The first field in the Field Order list will become the first field on the left of the report.

5. Move the remaining fields you want and click OK.

ClarisWorks creates the new layout and shows the current records in the new arrangement.

Your report should look something like figure 6-18.

Sold To	Item	Price	Quantity	Total
Cook & Book	Salutary	6.5	10	65
Delaware	Encyclopedia	640	2	1280
Jones	Computer	28	10	280
Mary's Book	Dickens Set	9.5	6	57
Titan Books	Computer	28	6	168
World of Books	Encyclopedia	640	3	1920

Figure 6-18
Records in the new columnar layout

- **Switching Layout** ClarisWorks adds the new layout to the list of commands at the bottom of the Layout menu. Now, to switch layouts, all you have to do is choose the layout you want.

Understanding Layouts

Mary immediately notices that the item names are cut off and that the prices and total amounts are not in dollar figures. To adjust field sizes and add currency signs, she needs to work directly with the layout.

Up to this point in the tutorial, you've worked with records in Browse and Find—two of the three ways of working with a database document. The third way is Layout, which gives you a graphic view of a database.

In the previous section, you created a columnar layout automatically, without leaving Browse. Now, to work directly with a layout, you switch to Layout, where you can move fields around, change fonts and or number formats, and generally shape the way you want a database to look.

To switch to Layout

- **Choose Layout from the Layout menu.**

  Do this now so you can take a closer look at a database document in Layout.

  Mary's columnar report, in Layout, is shown in figure 6-19.

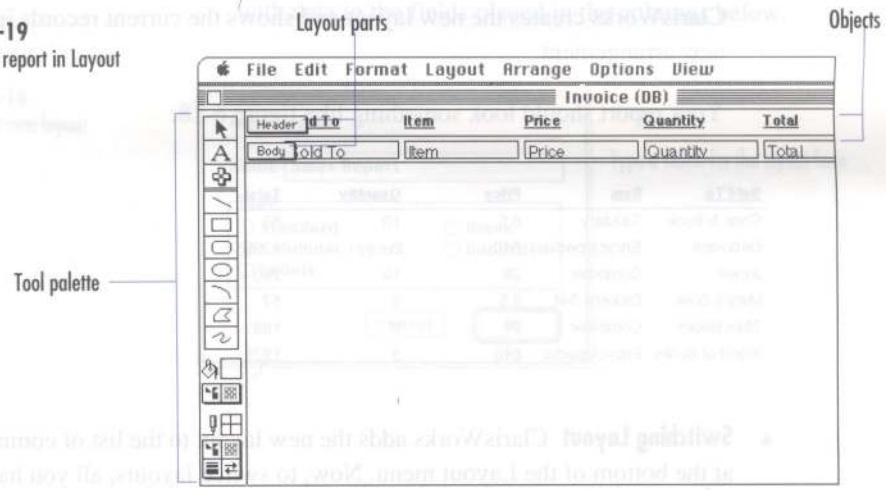


Figure 6-19
Columnar report in Layout

Several elements are different in this view of the document. The menus have changed to graphics menus, and the tool palette is now present. You see elements called *layout parts*—in figure 6-19, a header and body.

Fields and field labels are now represented as *objects.* Objects in a database layout behave the same way as the graphic objects you worked with in chapters 2 and text objects in chapter 3. For example, you can resize the objects and move them around.

When you change the objects in a layout, you change the way a record looks when you're in Browse and when you print. For now, stay in Layout for a moment to learn how everything works.

Working in Two Views

In ClarisWorks, you might want to expand your view when you revise a layout. You can open another window on the document and use one window to work in Layout and the other to see the effects in Browse.

To work in two windows

1. **Choose New View from the View menu.**

   ClarisWorks opens a window that looks identical to the original. It is, except that the number *2* has been added to the title.

   To get both windows into view, you could resize the new window by hand, but ClarisWorks can do the job for you.

2. **Choose Tile Windows from the View menu.**

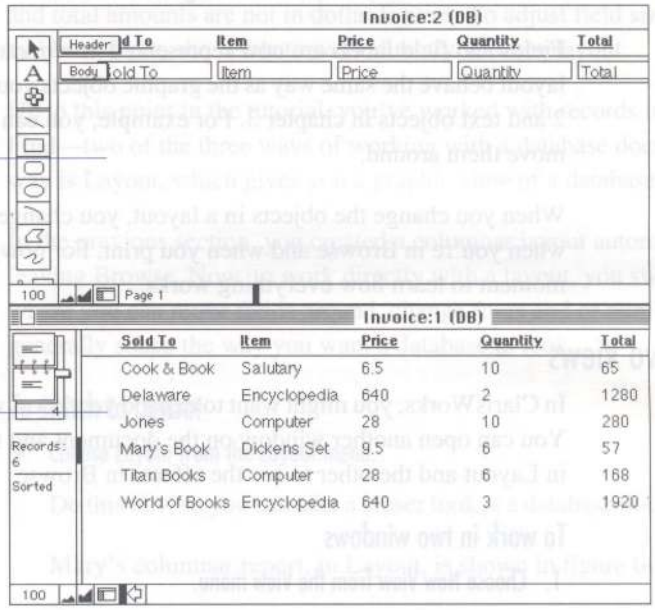
   ClarisWorks divides available screen space between the two windows.

3. **Activate the bottom window by clicking anywhere in it.**
4. **Choose Browse from the Layout menu.**

   ClarisWorks switches the active window to Browse, leaving the other window in Layout.

Mary's tiled windows are shown in figure 6-20.

Figure 6-20
Tiling database windows



This window is in Layout

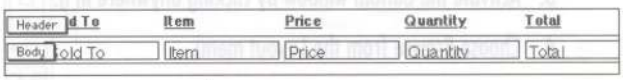
This window is in Browse

Fine-Tuning the Report

When you left Mary earlier, she was about to change the layout to enlarge the Item field, whose data was cut off, and change two of the number fields to show currency signs (figure 6-21).

- Click anywhere in the Layout window to activate it.

Figure 6-21
Mary's report in Layout



To change the size of a field or field label

1. Select the graphics tool and click the field or field label to select it.

Graphics tool

Everything in Layout works the way it does in a graphics document, so you see handles on a selected object.

Mary selects the item field.

2. Drag one of the handles to enlarge or shrink the field or field label.

Mary changes the Item field so that the complete item name will appear in Browse (figure 6-22). Don't worry that the field now extends beyond the border or the body part (the body part is the area above the line). You'll fix that later.

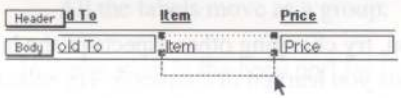


Figure 6-22
Resizing a field in Layout

Notice that as soon as you let go of the mouse button, the Browse window reflects the change.

You can use all the graphics tools when you work with layouts. For example, if you get fields out of line, you can realign them as you realigned objects in chapter 4.

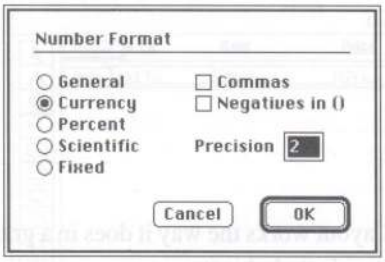
To change the way numbers look

1. Double-click the number field you want to change.

Mary clicks the Price field. The Number Format dialog box opens (figure 6-23). You can also select the field and choose Field Format from the Options menu.

2. Click the option you want.

Figure 6-23
Changing number format



Mary clicks Currency so that numbers will show a dollar sign. She leaves the precision—the number of decimal places—at 2, the preset option. Change the 2 to a 0 if you want whole dollars.

3. Click OK.

ClarisWorks changes the numbers. You can see the effect in the Browse window.

Practice Moves

Before you go on, try changing other aspects of the layout, such as the font, using the methods you learned in chapter 3. Try selecting a field and adding a fill color (you might need to make the window larger to see the fill color palette). Any changes you make in Layout appear in every record in the database, in Browse and when you print.

Adding a Picture to a Layout

The sales report looks very plain, so Mary decides to polish up the appearance by adding the company logo to the layout.

To make room in a header for art

1. In the window that's in Layout, open the layout you want to change.

   Mary has chosen Sales Report from the Layout menu.

2. With the graphics tool selected, drag the Header part downward to make room for the art you plan to add.

   The pointer changes to a double arrow when it's in position to drag (figure 6-24).

Figure 6-24
Dragging the Header part

3. Hold down Shift and click each field label to select all the field labels.
4. Drag the labels to just above the header part line.

   All the labels move as a group.

To make room in the body part for field text

- With the graphics tool selected, drag the Body part downward (as you did earlier with the Header part) to make room for the Item field text.

To add a picture

1. **Choose Insert from the File menu.**

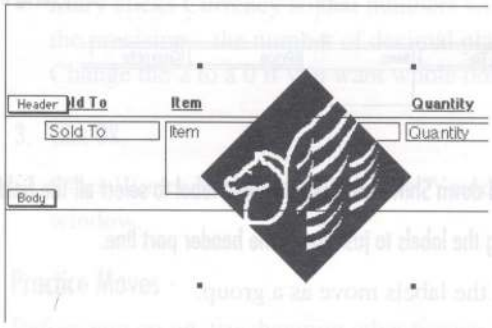
   You see the Open dialog box. The names of existing documents appear in the list on the left.

2. **Change folders, if necessary, to find the ClarisWorks Tutorial folder.**

3. **Select the document name "Pegasus Art" and click Open (or double-click the document name).**

   ClarisWorks inserts the picture in the layout (figure 6-25). The art has handles, indicating that the object is selected.

Figure 6-25
Art inserted in Header part



To rescale the art

1. **Choose Scale Selection from the Options menu.**

   The dialog box is the same one you worked with in chapter 4.

2. **Type 50% for both dimensions, and click OK.**

   ClarisWorks reduces the art and leaves the object selected.

3. Drag the scaled art into the position you want (figure 6-26).

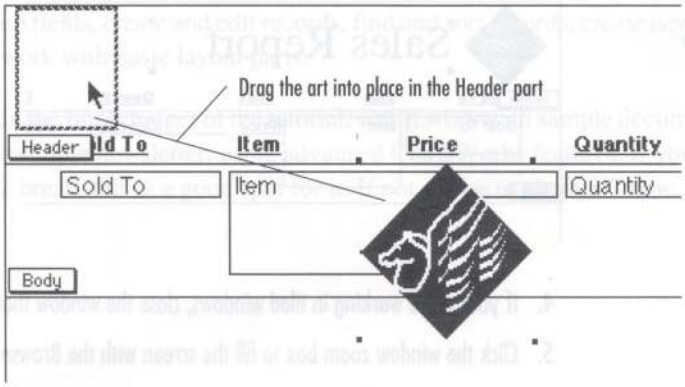


Figure 6-26
Art in place in Header part

Mary puts the logo in the corner and aligns it with the first column.

To add text to the header

1. Select the text tool.
2. Choose a font, size, and style from the Format menu.

   Mary chooses Times, 24 point, Plain.

3. Click once in the Header part and type the text.

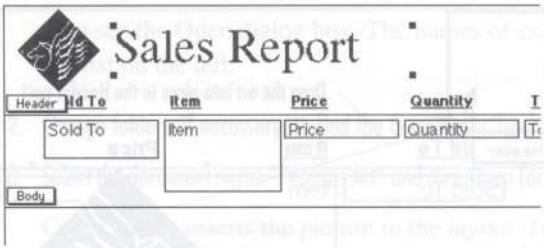
   Mary types "Sales Report."

4. Select the graphics tool and click the text to select it.

   You can now move the object that contains the text. If necessary, drag a handle to widen the box enough to hold the text on one line.

Mary's header is shown in figure 6-27.

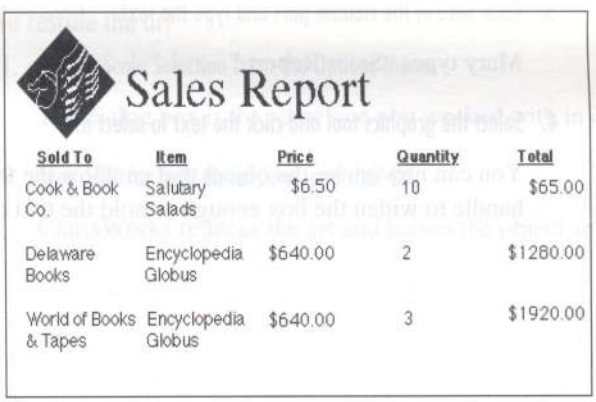
Figure 6-27
Finishing the header



4. If you're still working in tiled windows, close the window that's in Layout.
5. Click the window zoom box to fill the screen with the Browse view.

You can now see the full effects of the header and the other layout work you did (figure 6-28).

Figure 6-28
The finished product, a sales report



6. To see how the page will appear when printed, choose Page View from the View menu.

Wrapping Up Chapter 6

You've now explored a ClarisWorks database document. You've learned to set up fields, create and edit records, find and sort records, create new layouts, and work with basic layout parts.

In the final chapter of the tutorial, you'll work with sample documents to create a simple newsletter, using advanced ClarisWorks features. If you're ready for a break, this is a good spot for it. If not, go on to chapter 7 now.

Chapter 7

Learning to Use Advanced Features

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Chapter 7

Learning to Use Advanced Features

In this session of the tutorial, you'll use frames to create a newsletter, using sample documents provided.

In the earlier chapters of the tutorial, you learned about ClarisWorks concepts such as document types and objects and learned how to use various tools and view controls.

Now you're ready to speed through some advanced features. "Advanced" doesn't mean these features are difficult to learn. Instead, it means they use the full power of ClarisWorks.

In this section you'll learn how to

- lay out a newsletter page using linked text frames
- import text and graphics directly into a document
- create and work with a spreadsheet frame
- update a spreadsheet-based chart

Creating a Newsletter

In this session, you'll combine ready-made art and text documents to create a simple one-page newsletter for employees of Pegasus Books International, the sample company used in the tutorial. Sample source documents have been provided.

As noted, this session moves quickly. If you've forgotten how to do a step mentioned here, go back to the appropriate session of the tutorial for a quick refresher.

To start the newsletter

1. **Open a new graphics document.**
2. **Choose Show Rulers from the View menu.**

   The graphics rulers appear at the top and sides, set in inches (the preset option). Newsletters require precise work, so you'll want to leave the graphics rulers open in the document.

◆ **Why Use a Graphics Document?** Your first thought when starting a newsletter might have been to open a word processing document and use columnar text. A graphics document provides a much more flexible environment for the page-layout process, partly because a graphics document allows columns of different widths and lengths on the same page.

Inserting the Art

In this step you'll insert pre-drawn art from a MacPaint document, supplied in the Tutorial Folder, into the newsletter to serve as a masthead.

To add the letterhead art

1. Choose Insert from the File menu.

   You see the Insert dialog box (figure 7-1). Change folders, if necessary, to make the Tutorial Folder current.

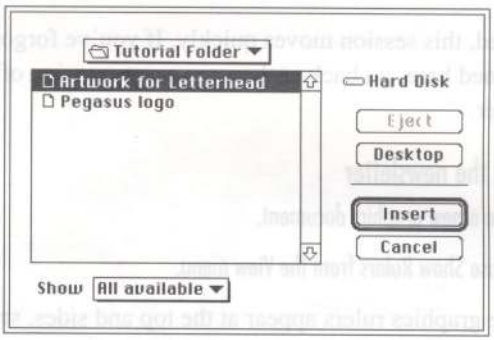


Figure 7-1
Inserting the art

2. Double-click the document named "Artwork for Letterhead."

   ClarisWorks inserts the artwork automatically into the new graphics document you created, leaving the art selected.

3. Drag the art into a position at the top of the page (figure 7-2).

4. When the art is in position, deslect it by clicking anywhere else in the document.

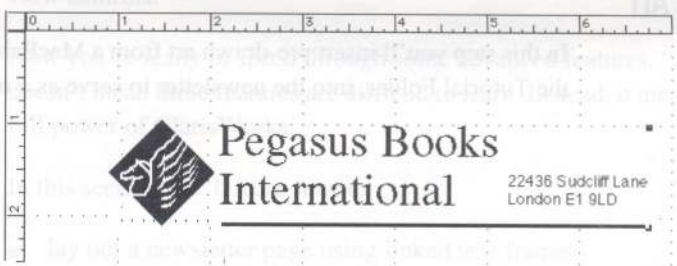


Figure 7-2
Art in position as newsletter masthead

Creating a Place for the Text Article

To create columns for the text article, you'll work for the first time with linked **frames**—two objects you can resize and move separately without disturbing the contents of the objects.

You've actually been working with frames throughout the tutorial. In chapters 2 and 4, when you typed text in a graphics document, you created an object that contained text. That's what a frame is: an object that contains something.

The newsletter will be a two-column piece, so you'll start by drawing two text frames. Then you'll "pour" the text article into the frames.

To create linked text frames

1. **Choose Frame Links from the Options menu.**

   Nothing seems to happen, but you've let ClarisWorks know that you plan to draw linked frames. The Frame Links command now has a check mark to remind you that the link feature is on.

2. **Select the text tool, and drag to draw a box, about the size of the box shown in figure 7-3.**

   A crossbar on the text insertion point helps you draw precisely.

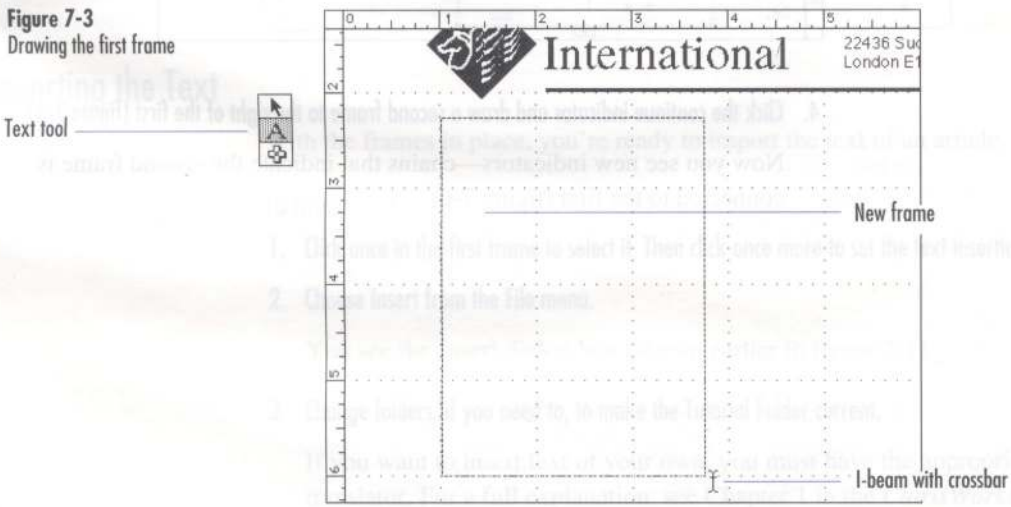
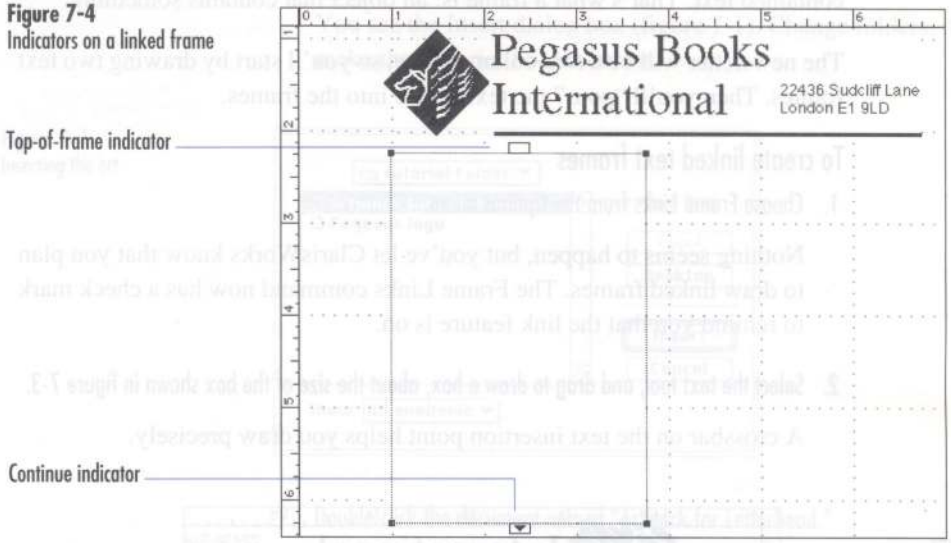


Figure 7-3
Drawing the first frame

3. **Press Enter.**

You see the link controls, showing the status of the frame (figure 7-4).

Figure 7-4
Indicators on a linked frame

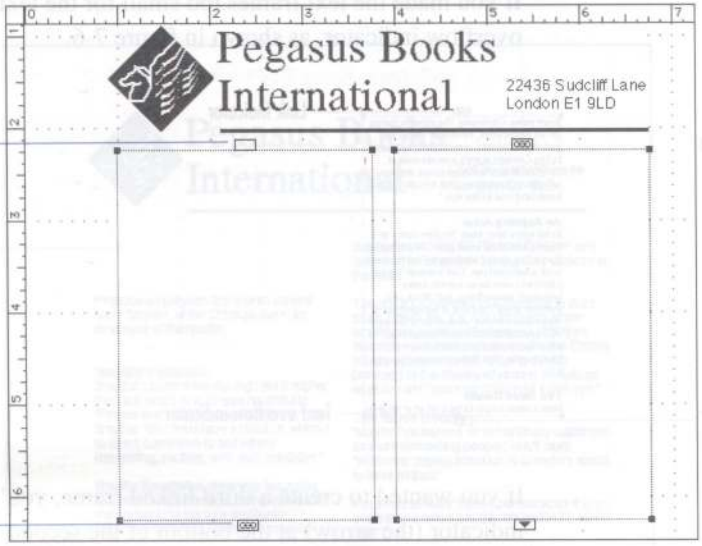


4. **Click the continue indicator and draw a second frame to the right of the first (figure 7-5).**

   Now you see new indicators—chains that indicate the second frame is connected to the first (figure 7-6).

5. Shift-click each frame to select them so you can see how they look in the document.

Figure 7-5
Second frame in place



Inserting the Text

With the frames in place, you're ready to import the text of an article.

To insert text

1. Click once in the first frame to select it. Then click once more to set the text insertion point.
2. Choose Insert from the File menu.

   You see the Insert dialog box (shown earlier in figure 7-1).

3. Change folders, if you need to, to make the Tutorial Folder current.

   If you want to insert text of your own, you must have the appropriate translator. For a full explanation, see Chapter 1 in the *ClarisWorks Handbook*.

4. Double-click the document named "Employee of the Month."

   ClarisWorks inserts the text in the first frame and sends the overflow into the second frame.

5. Select the graphics tool.

If you made the text frames too small for the text, you'll also see a text overflow indicator, as shown in figure 7-6.

Link indicator
store sales. Obviously, the eclectic tastes of the employees, several of whom are part-time students or musicians, appealed to the Chicago store's upscale market. Smythe directs browsers to the display whenever he notices what he calls "that searching look in the eye."
An Aspiring Actor
In his spare time, Mark Smythe works on a hoped-for career as an actor. "My eventual goal is the stage," Mark says, "but for now I work wherever I can. Last summer I had a chance to work as an extra in some television productions, but I stuck with summer stock. I did a lot of hanging out at stage doors on the weekends, and it paid off." Mark landed the leading role in a musical comedy. "No, I can't sing well," Mark laughs, "but I talked my way through it."
The Sales Details
Mark's sales began to take off after his first
Continue indicator
Text overflow indicator

Figure 7-6
More text to come

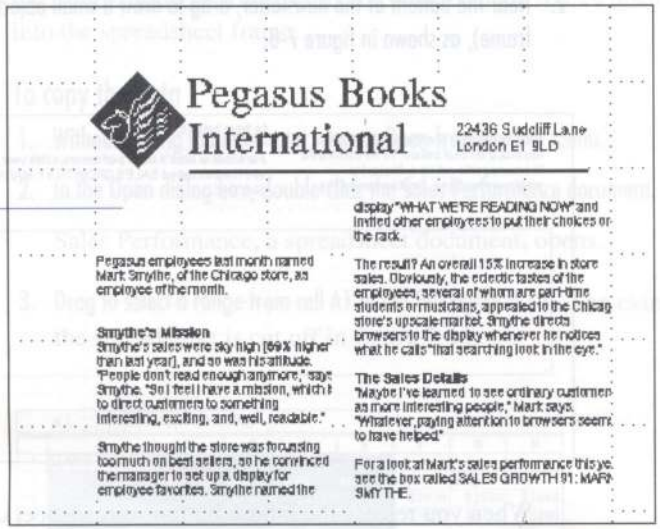
If you wanted to create a third linked frame, you'd click the continue indicator (the arrow) at the bottom of the second frame and then draw the third frame.

Resizing the Columns

You can now use the graphics tool to resize and move the two columns to get them precisely where you want them.

Using figure 7-7 as a guide, resize the columns to make room for an article headline over the first frame.

Figure 7-7
The newsletter so far


Pegasus Books
International
22436 Sudcliff Lane
London E1 9LD
Space for headline
display "WHAT WE'RE READING NOW" and invited other employees to put their choices on the rack.
Pegasus employees last month named Mark Smythe, of the Chicago store, as employee of the month.
The result? An overall 15% increase in store sales. Obviously, the eclectic tastes of the employees, several of whom are part-time students or musicians, appealed to the Chicago store's upscale market. Smythe directs browsers to the display whenever he notices what he calls "that searching look in the eye."
Smythe's Mission
Smythe's sales were sky high [69% higher than last year], and so was his attitude. "People don't read enough anymore," says Smythe. "So I feel I have a mission, which is to direct customers to something interesting, exciting, and, well, readable."
The Sales Details
"Maybe I've learned to see ordinary customers as more interesting people," Mark says. "Whatever, paying attention to browsers seems to have helped."
Smythe thought the store was focusing too much on best sellers, so he convinced the manager to set up a display for employee favorites. Smythe named the
For a look at Mark's sales performance this ye see the box called SALES GROWTH 91: MARK SMYTHE.

Midway

You're now about midway through this session of the tutorial. In a moment you'll work with a spreadsheet frame and create a chart for the newsletter. This is a good time to name and save your practice document. (If you need a refresher, see chapter 3.)

The example shown in this chapter is named "Newsletter."

Adding a Spreadsheet Frame

To emphasize sales growth for the employee of the month, you'll now add a spreadsheet frame and turn it into a chart for visual impact.

To add a spreadsheet frame

1. Select the spreadsheet tool (the crossbar).
2. Near the bottom of the newsletter, drag to draw a small object (in this case, a spreadsheet frame), as shown in figure 7-8.

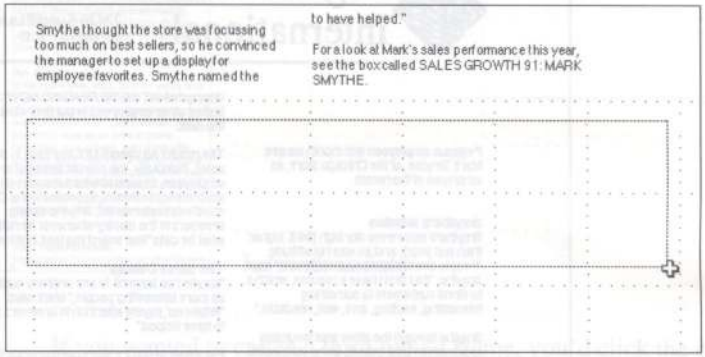

Smythe thought the store was focussing too much on best sellers, so he convinced the manager to set up a display for employee favorites. Smythe named the
to have helped."
For a look at Mark's sales performance this year, see the box called SALES GROWTH 91: MARK SMYTHE.

Figure 7-8
Drawing a spreadsheet frame

When you release the mouse button, spreadsheet cells appear in the frame (figure 7-9). Resize your frame if necessary so it shows columns A through E, and rows 1 through 6. Notice that the data entry bar and spreadsheet menus are now available in the document window (not shown in figure 7-9) whenever the spreadsheet tool is active.

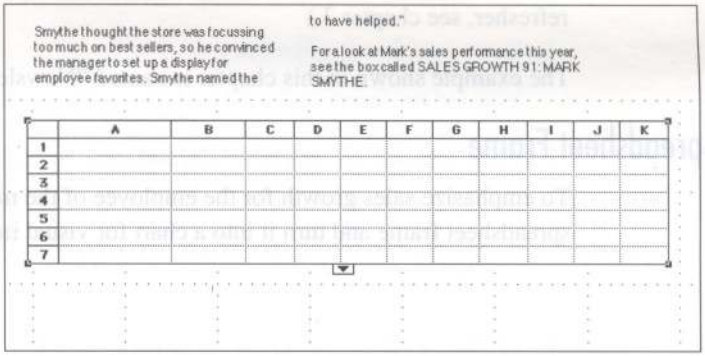

Smythe thought the store was focussing too much on best sellers, so he convinced the manager to set up a display for employee favorites. Smythe named the
to have helped."
For a look at Mark's sales performance this year, see the box called SALES GROWTH 91: MARK SMYTHE.
A B C D E F G H I J K
1 2 3 4 5 6 7

Figure 7-9
Spreadsheet frame in the newsletter

Copying Data from Another Spreadsheet

A source document on sales performance is available in the Tutorial Folder. In the following steps, you'll copy the data from the source document and paste it into the spreadsheet frame.

To copy the data

1. Without closing the newsletter, choose Open from the File menu.
2. In the Open dialog box, double-click the Sales Performance document.

   Sales Performance, a spreadsheet document, opens.

3. Drag to select a range from cell A1 to cell E6 (figure 7-10). The extreme right side of the spreadsheet is cut off in figure 7-10.

Figure 7-10
Selecting data

A1 | MARK SMYTHE

	A	B	C	D	E	F	G	H
1	MARK SMYTHE							
2		Summary	Jan	Feb	Mar	Apr	May	Jun
3		$28080	$900	$1100	$1500	$2220	$2550	$1890
4		$47480	$1200	$1500	$2400	$3600	$4400	$3800
5								
6		Percent Sales Growth			69%			
7								

4. Choose Copy from the Edit menu (or press Command-C).
5. Click the close box to put away the Sales Performance spreadsheet.

To paste the data you copied

1. In the newsletter, click the spreadsheet frame to activate it, and then click once in cell A1 to select the cell.

   As you learned in chapter 5, a border around cell A1 indicates that the cell is selected.

2. Choose Paste from the Edit menu (or press Command-V).

   ClarisWorks pastes the data into the spreadsheet frame.

Creating a Chart

You're now ready to create a chart from the data. A chart makes the numbers easy to comprehend and can sometimes make a striking visual point. To create the chart, you'll move to a full view of the spreadsheet.

To view the full frame

- With the spreadsheet selected, choose Open Frame from the View menu.

  ClarisWorks opens the full spreadsheet. You can now scroll across columns to get to the data you want.

To create a chart

1. Select cells A3 through B4.

   These cells contain sales summaries for the first quarter of the last 2 years (figure 7-11).

Figure 7-11
Selecting data for a chart

A3 | SALES IN 1990

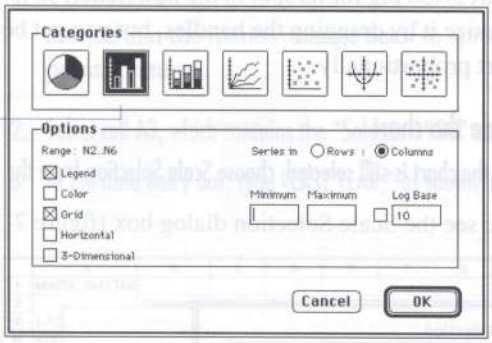
	A	B	C	D
1	MARK SMYTHE			
2		Summary	Jan	Feb
3	SALES IN 1990	$28080	900	1100
4	SALES IN 1991	$47480	1200	1500
5				

2. Choose Make Chart from the Options menu.

   You see the Make Chart dialog box.

3. Click the first bar chart icon, as shown in figure 7-12.

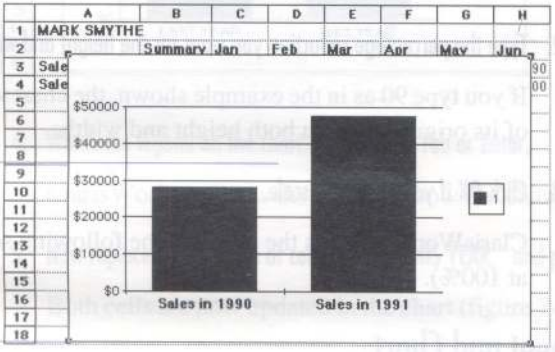
Figure 7-12
Selecting a type of chart



4. Click OK.

ClarisWorks draws a bar chart (figure 7-13) based on the data you selected.

Figure 7-13
New chart in the newsletter



- **Different Environment** Notice that the chart has handles. The handles show that the chart is a selected graphic object. Notice also that the menus (not shown in the figure) have changed to graphics menus, and the arrow pointer is now present.

Rescaling the Chart

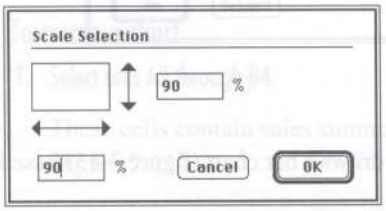
The chart is too big for its spot in the newsletter, so it needs to be reduced. You could resize it by dragging the handles, but you get better results if you rescale the chart proportionally.

To rescale the chart

1. **While the chart is still selected, choose Scale Selection from the Options menu.**

   You see the Scale Selection dialog box (figure 7-14).

Figure 7-14
Rescaling the chart



2. **Type the percentage reduction you want for the height and width.**

   If you type 90 as in the example shown, the chart would be reduced to 90% of its original size, in both height and width.

3. **Click OK if you want to rescale.**

   ClarisWorks reduces the chart (in the following section the chart was left at 100%).

Revising the Spreadsheet and Chart

ClarisWorks has automatically labeled the bar chart with the legends "Sales in 1990" and "Sales in 1991." These legends were derived from the left-most cells in the range you selected to make the chart.

For purposes of the newsletter, you want to change the legends to read "LAST YEAR" and "THIS YEAR." You'd also like to change the spreadsheet while you're at it. You can do both at the same time.

To change the spreadsheet and the chart

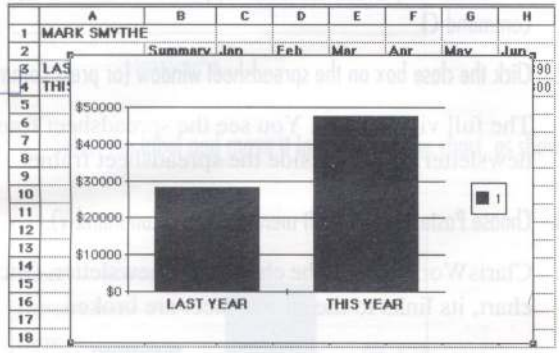
1. **Click somewhere in the spreadsheet, outside the chart.**

   Notice that the menus change back to spreadsheet menus, and the crossbar pointer returns.

2. **Select cell A3, which contains the "Sales in 1990" entry.**

3. **In the data entry bar, type "LAST YEAR," as shown in figure 7-15.**

Figure 7-15
Changing a spreadsheet entry



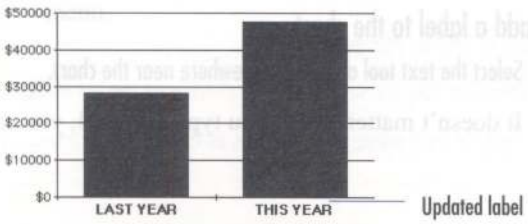
4. **Watch the legend on the chart as you press Tab or Enter.**

   ClarisWorks updates the chart to show the change you made in cell A3.

5. **Now replace the contents of cell A4 with "THIS YEAR," and press Tab or Enter.**

   Both cells are now updated in the chart (figure 7-16) and in the spreadsheet.

Figure 7-16
New label in chart



You could also change the numbers used for the chart or change the font or style used for entries. ClarisWorks updates the chart as soon as you confirm a new or modified entry in any cell that's used in the chart.

Moving the Chart into the Newsletter

You can now copy the chart and paste it into the newsletter.

To move the chart

1. Select the chart, and then choose Copy from the Edit menu (or press Command-C).
2. Click the close box on the spreadsheet window (or press Command-W).

   The full view closes. You see the spreadsheet frame at the bottom of the newsletter. Click outside the spreadsheet frame.

3. Choose Paste from the Edit menu (or press Command-V).

   ClarisWorks pastes the chart in the newsletter. Once you copy and paste the chart, its links to the spreadsheet are broken.

4. To hide the spreadsheet frame, drag the chart so that it covers the frame.

   You may need to resize and move the spreadsheet frame and then move the chart over it.

Adding Labels to the Chart

To finish the chart for the newsletter, you can add a label that identifies the chart by giving the name of the salesperson.

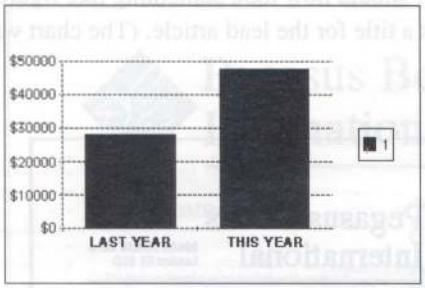
To add a label to the chart

1. Select the text tool and click somewhere near the chart.

   It doesn't matter where you type the label; you can move it later.

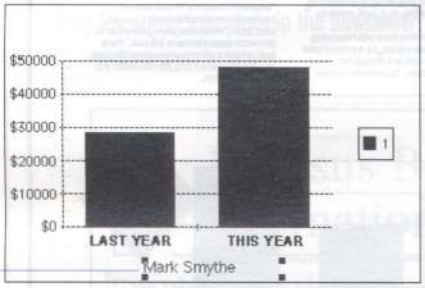
2. Type "Mark Smythe" (figure 7-17).

Figure 7-17
Adding a text label



3. Select the label and move it into place in the chart, as shown in figure 7-18.

Figure 7-18
Completed chart

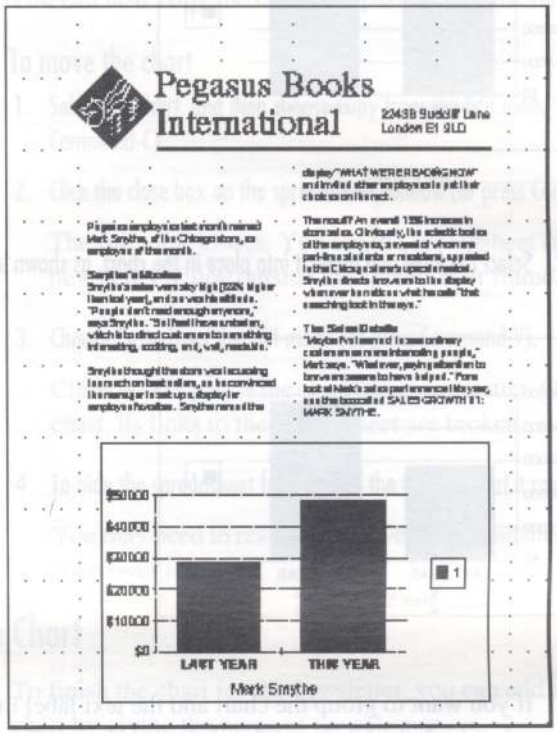


If you want to group the chart and the text label into one object, you can select both the label and the chart and choose Group from the Arrange menu.

Adding the Finishing Touches

The newsletter should now look something like figure 7-19. All that's needed now is a title for the lead article. (The chart was rescaled to 100% in figure 7-19.)

Figure 7-19
Status of the newsletter

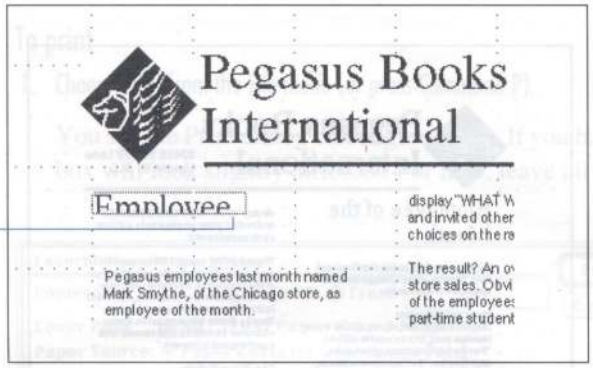


To add a title to the article

1. Select the text tool and click somewhere near the top of the text frames.
2. From the Font menu, choose Times as the font, and choose 24 points from the Size menu.

3. Type the title, "Employee of the Month" (figure 7-20).

Figure 7-20
Adding a title for the article



4. Select the graphics tool, click the text object, and drag a handle to expand the object.
5. Drag the object into place in the newsletter, above the article.

Figure 7-21
Placing the title

Pegasus Books
International
Employee of the Month
Pegasus employees last month named Mark Smythe, of the Chicago store, as employee of the month.
display "WHAT W
and invited other
choices on the re
The result? An o
store sales. Obvi
of the employees
part-time student

The newsletter is now complete. The finished page should look something like figure 7-22.

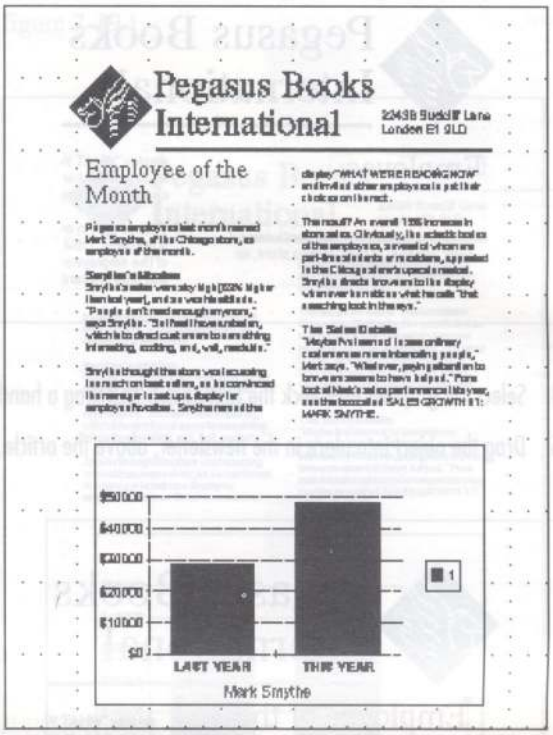


Figure 7-22
Newsletter complete

Wrapping Up Chapter 7

In this session of the tutorial, you learned how to create linked text frames, import text into the frames, and use a spreadsheet frame.

You also reviewed some skills that were covered earlier, such as adding text to a graphics document, creating a spreadsheet chart, and using the graphics rulers for precise placement of graphics elements.

If you've set up your printer, you may want to print the newsletter to see the results of your efforts.

To print

1. Choose Print from the File menu (or press Command-P).

   You see the Print dialog box (figure 7-23). If you have an ImageWriter, the box will look slightly different. For now, leave all the settings as they are.

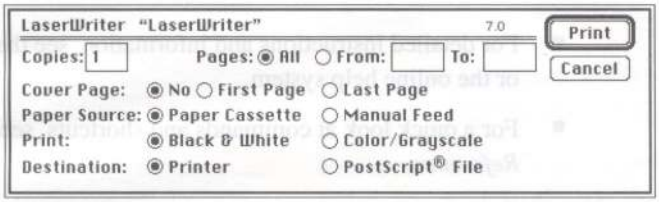


Figure 7-23
Printing a document (LaserWriter)

2. Click OK.

   ClarisWorks prints the newsletter exactly the way it looks on the screen. (except for the onscreen layout part)

Where to Go from Here

This session concludes the ClarisWorks tutorial. There's much more to learn than Claris could cover in the six tutorial chapters. Following are some suggestions for increasing your ClarisWorks skills.

Keep Using Help

In chapter 2 you learned to open and use the ClarisWorks online help system. The help system is a quick-access resource for those times when you want how-to or reference information and you want it *now*.

Many people are cautious about using online publications like help, but that's mostly because they're more accustomed to printed manuals. The more you use help, the more you'll rely on it as a fast way to get the instructions you need.

Use Your Handbooks

The *ClarisWorks Handbook* and the *Communications Handbook* contain step-by-step instructions and reference information. Both manuals have detailed tables of contents and indexes to help you find what you need in the most direct way possible.

Claris recommends that you avoid using the tutorial chapters for reference. The tutorial is an *introduction only* and doesn't contain the complete information you'll want as you begin to do more advanced projects in ClarisWorks.

- For detailed instructions and information, see the *ClarisWorks Handbook* or the online help system.
- For a quick look at commands and shortcuts, see the *ClarisWorks Quick Reference.*
- To learn to communicate with an online information service, see the *Communications Handbook.*

Glossary

application environment: In ClarisWorks, one of five types of software you use to work in different types of documents and frames. Each environment has it's own set of menus.

arrow keys: The up, down, left, and right arrow keys on a Macintosh keyboard.

arrow pointer: The pointer on the screen when the graphics tool is selected.

attributes, text: The font, size, style, color, alignment, and line spacing assigned to text. Text attributes determine how text looks when you print.

autogrid: In a graphics document, a hidden control device that helps you create objects of precise sizes and keep the objects lined up on the page.

bar chart: A chart that represents spreadsheet data as bars, side by side or stacked horizontally. Often used to illustrate relative quantities.

body: In a database layout, the portion of the layout that holds the data in all the current records.

bookmark: In a database document, the tab on the record book. You can drag the bookmark quickly from one record to another.

browse: A database feature you use to add, edit, and sort records; enter data; and find records. Records are organized in browse according to the current layout.

buttons: In ClarisWorks documents, onscreen elements you click to give instructions to ClarisWorks and the Macintosh. In ClarisWorks help, onscreen elements you click to move to a topic.

cell: In a spreadsheet document, the box formed at the intersection of a column and a row.

cell address: In a spreadsheet document, the combined designation of column letter and row number that identifies a cell. The address of a cell in column H, row 12, is H12.

cell format: In a spreadsheet document, the width of columns, the depth of rows, and the specifications for number style and text attributes.

cell range: In a spreadsheet document, a group of selected cells.

chart: A graphic representation of the data in a spreadsheet, used to illustrate relationships among sets of data. A chart is a graphic object that can be pasted into another type of document.

chart title: The name ClarisWorks uses for a spreadsheet chart. ClarisWorks takes the chart title from any text in the cell at the upper-left corner of the chart range.

Clipboard: A temporary storage area in computer memory where ClarisWorks places the most recent selection you have cut or copied.

copy: To place a copy of selected text or objects on the Clipboard without removing the selection from its original location. You can paste the contents of the Clipboard elsewhere.

crossbar pointer: The pointer on the screen when the spreadsheet tool is selected.

cut: To remove selected text or objects and place a copy of the selection on the Clipboard. You can paste the Clipboard contents elsewhere.

data entry bar: In a spreadsheet document, the box used to enter data or formulas.

data series: The values ClarisWorks uses to draw a chart from a spreadsheet.

database: A collection of information; also, software you use to collect, organize, and search for information.

database book: A tool used to move through records in a database and to check their sort or find status.

delete: To remove (erase) selected text or objects from a document.

divisions: In a spreadsheet chart, the intervals or categories used to plot values in a data series. Divisions usually represent columns.

document: A Macintosh file created by an application. In ClarisWorks, you can create and work with five different types of documents, each designed primarily for a specific task—word processing, spreadsheet work, database management, graphics, or communications.

editing: The process of revising a computer-based document.

environment: See application environment.

existing document: A document you have previously saved.

field label: A text object that contains the name of a field.

field type: A designation, such as number, for the sort of information you plan to enter in a database field.

field (calculation): In a database document, a field that contains the results of a formula you enter when you define the field.

field (number): In a database document, a field that can contain any number you can type, including decimal points if appropriate.

field (search): In a database document, the field or fields in a find request that contain the search criteria you type.

field (selected): In a database document, the current (active) field.

field (text): In a database document, a field that can contain any characters you can type—letters, numbers, or symbols.

field definition: In a database document, a field name and certain additional attributes, such as what type of data the field can contain. The data type determines what work you can do with the field.

field: In a database record, an element that holds a category of information.

fields (date and time): In a database document, fields that must contain dates or times, respectively.

file format: The way an application organizes and stores the contents of a document.

filling right, filling down: In a spreadsheet document, the process of filling cells with the contents of the first cell in a selected range.

find: A database feature used to search for records that match search criteria you enter in a find request.

find request: See **request (find).**

font: A collection of type faces with a particular appearance.

footer: A page element that appears at the bottom of every printed page in a document.

footnote: A comment or citation at the bottom of a text page that refers to numbers or symbols used as signals in the text.

found set: The group of records that remains available for browsing after you execute a find request.

frames: Objects that can contain text, or spreadsheets.

function: A predefined formula that performs mathematical or logical calculations, acting on values you specify or supply.

graphics ruler: The ruler you use to control the automatic grid and the spacing of gridlines in a graphics document.

gridlines: A matrix of dotted lines used to size and align objects in a graphics document.

grouping: The process of consolidating several selected objects into one object.

handles: Black squares ClarisWorks places at the edges of selected objects. You use handles to resize and reshape objects.

header: A page element that appears at the top of every printed page in a document.

I-beam pointer: The pointer on the screen when the text tool is selected.

indentation: The distance of text from the page guides.

invisible characters: Characters that represent formatting instructions you give from the keyboard by pressing Return, Tab, or the Space bar.

justification: The process of adjusting text margins so that the text exactly fills a line.

layout (columnar): In a database document, a layout that shows and prints fields in columns. Each record appears as a row.

layout (standard): In a database document, the preset arrangement of all the fields you have created, with each field on a separate line and the fields stacked vertically.

layout: In a database document, a graphic representation of the way records will look when you browse or print records. You can use different layouts to display, organize, and print the same information in different ways.

legends: In a spreadsheet chart, the labels for the data series and divisions on the chart.

margins: The blank space around the top, bottom, left, and right of document contents.

number format (currency): A format that adds a currency symbol to a number.

number format (general): A format that causes a number to fill a cell, with a floating number of decimal places to the right of the decimal point.

object: An element that you can select by itself, resize, and move around within a document.

online: Available on the computer. Also, the state of being in direct communication with another computer via a network or telephone line.

online help: A system of instructions to which you have direct access on a computer screen.

operators: Symbols used in a formula to define the action to be performed.

order (ascending): Alphabetical order (A to Z) for words, lowest-to-highest order for numbers, and earliest to latest for dates or times.

order (descending): Reverse alphabetical order for words (Z to A), highest-to-lowest order for numbers, and latest to earliest for dates or times.

order (sort): In a database or spreadsheet document, the hierarchy of fields or cells by which you want ClarisWorks to sort. Also, the method used to sort data (in ascending or descending order).

order (stacking): The arrangement of objects in a document. The most recently created object is placed at the top of the stack.

page guides: The dotted borders around each page that show where the document's top, bottom, left, and right margins are set.

page view: A view that shows you exactly how a document will appear when you print. Page view shows margins and headers and footers, if any. It is also the only way to see database summary information on the screen.

panes: Split views of the same document. Panes can be horizontal (across the screen) or vertical (split lengthwise).

paragraph (selected): A highlighted paragraph. A paragraph is selected when the text insertion point is blinking anywhere in the paragraph, whether or not the paragraph is highlighted.

paragraph: The basic formatting unit of a text document. Except for individually styled words and lines, text format you set applies to all of a selected paragraph or paragraphs.

part (footer): In a database layout, a repeating element that appears at the bottom of each page.

part (header): In a database layout, a repeating element that appears at the top of each page.

part: In a database document, a section of a layout used to organize data on the page or to summarize data within the document.

pasting: The process of placing the contents of the Clipboard in the same or a different location. See cut and copy.

pen tool: The tool you use to change the width, pattern, and color of lines or an object's border.

pica: A typographic measure equal to 1/6 inch (12 points).

pie chart: A circular chart that represents spreadsheet data as "slices" of a pie. Often used to show the relative contribution of values to a total.

point: A typographic measure equal to 1/72 inch.

record (selected): In a database document, the current (active) record. A selected record is highlighted when you click anywhere outside a field.

record book: In a database document, the book icon that shows the number of the current record. See also bookmark.

record: In a database document, a collection of data about a single activity or transaction. Corresponds to a printed form such as an invoice.

records (omitted): In a database document, records that have been temporarily removed from the active set of records.

request (find): In a database document, a blank view of the current layout, used to enter search criteria.

ruler division: The tick marks on a ruler.

search criteria: Characters you enter to search for certain text (word processing), records (database) or cells (spreadsheet).

selection: The process of activating text, a text paragraph, or an object so that you can work with it.

shift constraint: The process of holding down the Shift key while you manipulate an object to limit the object to a certain angle or shape.

size (text): The measure of type size in points.

smoothing: The process of rounding out sharp angles in a polygon object.

spacing (line): The vertical distance from the base of one line of type to the base of the next line below. Line spacing is set in points and applies to all lines within a selected paragraph.

spreadsheet: A document arranged in columns and rows, usually used to work with numeric data. A spreadsheet can contain formulas that allow complex "what-if" analyses of data.

spreadsheet tool: The tool you use to work in a spreadsheet document and to draw spreadsheet frames.

stationery: A document in which you save all the formatting of an original document.

status panel: The area in a database window that shows the sort status and the status of found records.

style (text): The way a font appears on the screen and when you print.

superscript: A number or character raised above the main line of text (the baseline is higher than that of the main line).

tab: A character you insert to cause text to line up at a certain point on the text ruler when you press Tab.

tab marker: A marker you drag into the text ruler to set a tab stop.

tabs (preset): Tabs that are automatically set when you create a new text document. Tabs are preset at 1/2-inch intervals.

text insertion point: A blinking vertical line that indicates where the next text character you type will appear.

text ruler: The ruler you use to control the left and right margins of a text page, the indentation of paragraphs, text justification, tab settings, and the spacing between lines.

thesaurus: A feature you can use to find synonyms for a selected word or a word you specify.

tool (fill): The iconic representation of commands used to add or change the pattern and color of an object.

tool (graphics): The iconic representation of a command used to select and work with objects and to activate graphics menus.

tool (pen): The iconic representation of commands used to change line width, color, and pattern. You can also add arrowheads to lines.

tool (spreadsheet): The iconic representation of commands used to enter data in a spreadsheet and draw spreadsheet frames.

tool (text): The iconic representation of commands used to type text and draw text frames.

tool palette: A collection of iconic representations of commands used to draw objects, fill objects with different patterns and colors, and change line width and color.

translator: A utility application that allows you to convert documents from other applications to ClarisWorks documents, and vice versa.

ungrouping: The process of restoring the individuality of objects that have been consolidated into one object.

unsmoothing: The process of restoring angular shapes to a freehand graphics object that has been smoothed.

views (multiple): Separate windows for the same document.

window: A Macintosh graphic frame through which you view the contents of a document (file).

window (active): The window in which whatever you do takes effect. A window is active when the title bar shows lines beside the title and the scroll bar is shadowed.

windows (stacked): An arrangement of windows that exposes a corner of each window. Stacking makes it more convenient to click back and forth between windows.

word wrap: A method of paragraph formatting that carries the last word in a line to the next line below, without requiring you to press Return.

work area: The part of a document that contains what you type or draw.

WYSIWYG: A method of displaying a document on the screen so that you see the document as it will appear when printed. The letters (pronounced "wizz-ee-wig") stand for "What You See Is What You Get."

zoom controls: Two icons (large and small mountains) you use to enlarge or reduce the view of a document.

zoom percentage box: A box that shows the current percentage of enlargement or reduction of document contents.

zoom percentage: The amount of reduction or enlargement of the active document.: Actual size is 100%. Percentages over 100 enlarge your view of a document, and percentages under 100 reduce it.

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